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FINAL REPORT

OF THE

ROYAL COMMISSION

ON

COAL SUPPLIES.

ROYAL COMMISSION ON COAL SUPPLIES.

FINAL REPORT

OF THE

ROYAL COMMISSION

ON

COAL SUPPLIES.

Part XIII.

REPLIES

OF

H.M. CONSULAR OFFICERS

IN ANSWER TO A

SERIES OF QUESTIONS UPON THE MAINTENANCE OF THE BRITISH COAL TRADE IN FOREIGN COUNTRIES.

Presented to both Houses of Parliament by Command of His Majesty.

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1905.

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TABLE OF CONTENTS.

		PAGE.
1.	Questions Addressed to British Consuls - - - - - -	iii
2.	List of Consular Reports Arranged in Order of Countries - -	v
3.	Table Showing the English Equivalents of Certain Foreign Moneys, Weights and Measures Referred to - - - - - -	ix
4.	Consular Reports - - - - - - - - - - -	1

Previous Publications of the Commission :—

First Report, with Minutes of Evidence and Appendices, Plans and Diagrams, 1903. [Cd. 1725.]

Second Report, with Minutes of Evidence and Appendices, Plans and Diagrams, 1904. [Cd. 1991.]

Publications Comprised in the Final Report :—

Part i.—General Report.

ii.—viii.—Reports of the District Commissioners.

ix.—Report of the Geological Committee.

x.—xi.—Minutes of Evidence and Appendices.

xii.—Plans and Diagrams.

xiii.—Replies received from H.M. Consular Officers in answer to a series of questions upon the Maintenance of the British Coal Trade in Foreign Countries.

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QUESTIONS FOR BRITISH CONSULS.

1. WHAT is the present consumption of coal per annum in your district—stating separately the quantity used for domestic purposes and manufacturing or steam purposes?

2. What have been the sources of supply in each year during the last ten years up to the end of 1903?

3. How far inland has British coal penetrated during the last ten years, and what have been the facilities for transportation during the same period?

4. State the highest and lowest prices obtained for British coal delivered into railway trucks alongside vessels in each of the last ten years, and at what prices other coals were sold under similar circumstances during the same periods. (In answering this question please state the particular kinds of coal referred to.)

5. Is any, and if so what, proportion of the British coal imported into your district afterwards shipped for the bunkers of British vessels?

6. If the quantity of British coals or coke imported into your district has fallen off during the last ten years, please state the reasons and what particular classes of coal are affected.

7. What are the railway rates chargeable on British coal in your district, and state whether there are differential rates for British coal as compared with native coal or other imported coals?

8. Can you make any suggestion as to how the British coal trade in your district can best be maintained, recovered (if it has fallen off), or increased?

9. Are there any exports of coal or coke from your district, and, if so, are these exports increasing?

10. Give any other information bearing upon the question, such as import duties or other impositions affecting the competitive power of British coals, which you consider may be of value to the Commission.

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ROYAL COMMISSION ON COAL SUPPLIES.

LIST OF CONSULAR REPORTS ARRANGED IN ORDER OF COUNTRIES.

EUROPE: Page.

AUSTRIA-HUNGARY:

BUDA-PESTH - - - - - 1
FIUME - - - - - - - 6
PRAGUE - - - - - - 8
SARAJEVO - - - - - - 8
TRIESTE - - - - - - 9
VIENNA - - - - - - 10

BELGIUM:

ANTWERP - - - - - - 12

DENMARK:

AARHUS - - - - - - 15
COPENHAGEN - - - - - 15
FAROE ISLANDS - - - - 17
REYKJAVIK (ICELAND) - - 18
ST. THOMAS - - - - - 18

FRANCE:

AJACCIO (CORSICA) - - - 18
ALGIERS - - - - - 19
AMIENS - - - - - - 19
ANTANANARIVO (MADAGASCAR) - - - - - - - 19
BASTIA (CORSICA) - - 20
BORDEAUX - - - - - - 20
BOULOGNE - - - - - - 22
BREST - - - - - - - 22
CALAIS - - - - - - - 23
CHERBOURG - - - - - 25
CORSICA:
See AJACCIO AND BASTIA.
DAKAR (SENEGAL) - - - 25
DUNKIRK - - - - - - 27
HAVRE - - - - - - - 29
LILLE - - - - - - - 35
LYONS - - - - - - - 36
MADAGASCAR:
See ANTANANARIVO AND TAMATAVE.
MARSEILLES - - - - - 43
MARTINIQUE - - - - 43
NANTES - - - - - - - 44
NICE - - - - - - - - 45
NOUMEA (NEW CALEDONIA) 45
PARIS - - - - - - - 46
PONDICHERRY - - - - - 47
RÉUNION - - - - - - 48
ROUEN - - - - - - - 48
SENEGAL:
See DAKAR.
ST. MALO - - - - - - 51
TAHITI - - - - - - - 52
TAMATAVE (MADAGASCAR) - 53

EUROPE—*cont.* Page.

GERMAN EMPIRE AND PRUSSIA:

BREMEN-BREMERHAVEN - 53
DANTZIG - - - - - - 55
DRESDEN - - - - - - 56
DÜSSELDORF - - - - - 56
FRANKFORT-ON-MAINE - - 56
HAMBURG - - - - - - 56
KÖNIGSBERG - - - - - 57
MANNHEIM - - - - - - 58
MEMEL - - - - - - - 58
MUNICH - - - - - - 59
PILLAU - - - - - - 59
STETTIN - - - - - - 60
STUTTGART - - - - - - 61
SWINEMÜNDE - - - - - 62

GREECE:

CEPHALONIA - - - - - 63
CORFU - - - - - - - 63
LAURIUM - - - - - - 63
PATRAS - - - - - - - 64
PIRÆUS - - - - - - 64
SYRA - - - - - - - 65
VOLO - - - - - - - 66
ZANTE - - - - - - - 66
ZEA - - - - - - - - 67

ITALY:

ANCONA - - - - - - 67
BRINDISI - - - - - - 69
CATANIA - - - - - - 70
CIVITA VECCHIA - - - - 70
ELBA - - - - - - - - 71
GENOA - - - - - - - 71
LEGHORN - - - - - - 73
MESSINA - - - - - - 74
MILAN - - - - - - - 75
NAPLES - - - - - - 76
PALERMO - - - - - - 76
ROME - - - - - - - 77
SAVONA - - - - - - 77
SICILY:
See PALERMO, MESSINA, AND CATANIA.
SPEZIA - - - - - - - 78
VENICE - - - - - - - 78

NETHERLANDS:

AMSTERDAM AND ROTTERDAM 79
BATAVIA - - - - - - 79
CURAÇOA - - - - - - 81
SURINAM - - - - - - 81

EUROPE—*cont.* Page.

PORTUGAL:

BEIRA - - - - - - - 82
CAPE VERDE ISLAND (ST. VINCENT) - - - - - 82
CHINDE - - - - - - 82
LISBON - - - - - - 83
LOANDA, FOR PORTUGUESE POSSESSIONS IN WEST AFRICA, SOUTH OF GULF OF GUINEA - - - 83
MADEIRA - - - - - - 84
MOZAMBIQUE - - - - - 84
OPORTO - - - - - - 84
PORTUGUESE EAST AFRICA
See BEIRA.
PORTUGUESE POSSESSIONS IN WEST AFRICA SOUTH OF GULF OF GUINEA:
See LOANDA.
THE AZORES (ST. MICHAEL'S) 86

ROUMANIA:

GALATZ - - - - - - 86
KUSTENDJIE - - - - - 92
SULINA - - - - - - 93

RUSSIA:

BATOUM - - - - - - 93
HELSINGFORS - - - - - 94
MOSCOW - - - - - 94
ODESSA - - - - - 94
RIGA - - - - - - - 96
LIBAU - - - - - - 96
PERNAU - - - - - - 96
WINDAU - - - - - 96
ROSTOV-ON-DON - - - - 97
ST. PETERSBURG - - - 97
WARSAW - - - - - - 98

SPAIN:

ALGECIRAS - - - - - - 98
BARCELONA - - - - - 99
BILBAO - - - - - - - 100
CADIZ - - - - - - - 104
CANARY ISLANDS:
See LAS PALMAS AND TENERIFFE.
CORDOBA - - - - - - 105
HUELVA - - - - - 106
LAS PALMAS (CANARY ISLANDS) - - - - - 106
PORT ST. MARY - - - - 106
SANLUCAR - - - - - - 107
SAN ROQUE - - - - - 107
SAN SEBASTIAN - - - 107
SANTANDER - - - - - 108
SEVILLE - - - - - - 108
TENERIFFE (CANARY ISLANDS) - - - - - - 108

SWEDEN AND NORWAY:

CHISTIANIA - - - - 109
GOTHENBURG - - - - 113
STOCKHOLM - - - - - 113

SWITZERLAND:

GENEVA - - - - - 117
LAUSANNE - - - - - 119
ZURICH - - - - - - 119

EUROPE—*cont.* Page.

TURKEY:

ADANA - - - - - - - 121
ALEPPO - - - - - - - 121
ALEXANDRETTA - - - 121
ARABIA:
See HODEIDAH AND CAMARAN.
BAGHDAD - - - - - - 122
BASRAH - - - - - - 122
BEIRUT - - - - - - - 122
BENGHAZY (TRIPOLI) - - 123
CONSTANTINOPLE - - - 124
CRETE - - - - - - - 124
CANDIA - - - - - - 124
CANEA - - - - - - 125
DAMASCUS - - - - - 125
ERZEROUM - - - - - 126
HODEIDAH AND CAMARAN - 126
JEDDAH - - - - - - 126
JERUSALEM - - - - - 127
KONIA - - - - - - - 127
SALONICA - - - - - - 128
SAMOS - - - - - - - 128
SMYRNA - - - - - - 128
TREBIZOND - - - - - 129
TRIPOLI - - - - - - 129

ASIA:

ARABIA:

See TURKEY (HODEIDAH AND CAMARAN).

BATAVIA:

(JAVA).
See NETHERLANDS.

BORNEO:

BRUNEI AND SARAWAK - 130

CHINA:

AMOY - - - - - - 130
CANTON - - - - - 131
CHINKIANG - - - - - 132
CHUNGKING - - - - - 132
FOOCHOW - - - - - - 132
HANGCHOW - - - - - 133
HANKOW - - - - - - 133
ICHANG - - - - - - 133
KIUKIANG - - - - - - 134
KIUNGCHOW - - - - - 134
KUEICHOW - - - - - - 134
NEWCHWANG - - - - - 135
NINGPO - - - - - - 135
PAKHOI - - - - - - 136
SHANGHAI - - - - - - 136
SWATOW - - - - - - 137
TIENTSIN - - - - - - 137
WENCHOW - - - - - - 137
WUCHOW - - - - - - 138
WUHU - - - - - - - 138
YUNNAN-FU - - - - - 138

COREA:

CHEMULPO - - - - - - 139

ASIA—*cont.* Page.

JAPAN:
HAKODATE - - - - - 140
NAGASAKI - - - - - 141
SHIMONOSEKI - - - - 141
TAINAN (FORMOSA) - - 142
TAMSUI - - - - - 143
YOKOHAMA - - - - - 144

MUSCAT:
MUSCAT - - - - 144

PERSIA:
BUSHIRE - - - 144
KERMAN - - - - 145
NASRATABAD - - 145
SHIRAZ - - - - 145
TABRIZ - - - - - 145
TEHRAN - - - - 145

PONDICHERRY:
(INDIA)
See FRANCE.

SIAM:
CHIENGMAI - - - - 146

AFRICA:

ABYSSINIA:
ADIS ABABA - - - - 147

ALGIERS:
See FRANCE.

AZORES ISLANDS:
See PORTUGAL.

CANARY ISLANDS:
See SPAIN.

CAPE VERDE ISLANDS:
See PORTUGAL.

EGYPT:
ALEXANDRIA - - - - 148
CAIRO - - - - - 150
PORT SAID - - - - - 151

LIBERIA:
MONROVIA - - - - - 151

MADAGASCAR:
See FRANCE (ANTANANARIVO AND TAMATAVE)

MADEIRA:
See PORTUGAL.

MOROCCO:
TANGIER - - - - - 152

MOZAMBIQUE:
See PORTUGAL.

PORTUGUESE EAST AFRICA:
See PORTUGAL (BEIRA).

PORTUGUESE POSSESSIONS IN WEST AFRICA, South of Gulf of Guinea:
See PORTUGAL (LOANDA).

RÉUNION:
See FRANCE.

AFRICA—*cont.* Page.

SENEGAL:
See FRANCE (DAKAR).

SOMALILAND:
BERBERA - - - - 153

TRIPOLI:
See TURKEY (BENGHAZY AND TRIPOLI).

TUNIS:
BIZERTA - - - - - 153
SFAX - - - - - - 154
TUNIS - - - - - - 154

UGANDA:
ENTEBBE - - - - - 155

ZANZIBAR:
ZANZIBAR - - - - 155

AMERICA:

ARGENTINE REPUBLIC:
BUENOS AIRES - - - - 156
ROSARIO - - - - - 157

BRAZIL:
BAHIA - - - - - - 157
MANAOS - - - - 157
MARANHAM - - - - 158
PERNAMBUCO - - - - 158
PORTO ALEGRE - - - - 159
RIO DE JANEIRO - - - 159
RIO GRANDE DO SUL - - 160
SANTA CATHERINA - - 160
SAO PAULO - - - - 160

CHILE:
COQUIMBO - - - - - 161
CORONEL - - - - 162
LOTA - - - - - - 162
VALPARAISO - - - - 162

COSTA RICA:
SAN JOSÉ - - - - - 164

CUBA:
HAVANA - - - - - 164

CURAÇOA:
See NETHERLANDS.

ECUADOR:
GUAYAQUIL - - - - 165
QUITO - - - - - - 165

GUATEMALA:
GUATEMALA - - - - 165
LIVINGSTON - - - 166
QUEZALTENANGO - - - 166
SAN JOSÉ - - - - - 166

HAYTI:
PORT AU PRINCE - - - 167
SANTO DOMINGO - - - 167

HONDURAS:
AMAPALA - - - - 167
PUERTO CORTES - - - 168
TEGUCIGALPA - - - - 168

AMERICA—*cont.* Page.

MARTINIQUE:
See FRANCE.

MEXICO:
COATZACOALCOS - - - 168
MEXICO CITY - - - - 169
PROGRESO - - - - - 170
TAMPICO - - - - - 170
VERA CRUZ - - 171

NICARAGUA:
CORINTO - - - - 171
GREYTOWN - - - - - 172
MANAGUA - - - - - 172

PANAMA:
COLON - - - - - - 172
PANAMA - - - - - 173

PARAGUAY:
ASUNCION - - - - - 173

PERU:
CALLAO - - - - - 173
IQUITOS - - - - - 174

SURINAM:
(DUTCH GUIANA)
See NETHERLANDS.

AMERICA—*cont.* Page.

UNITED STATES:
BALTIMORE - - - 174
BOSTON - - - - - 175
CHARLESTON, S.C. - - - 175
CHICAGO - - - - 176
GALVESTON - - - - 176
HONOLULU - - 176
MANILA - - - - - 177
NEW YORK - - - - - 178
PHILADELPHIA - - - - 179
PORTLAND (MAINE) - - - 180
PORTLAND (OREGON) - - 180
PORTO RICO - - - - 181
SAN FRANCISCO - - - 181

URUGUAY:
MONTE VIDEO - - - - 186

VENEZUELA:
CARACAS - - - - - 186
CUIDAD BOLIVAR - - - 186

WESTERN PACIFIC ISLANDS:
NOUMEA (NEW CALEDONIA)
See FRANCE.
TAHITI, *See* FRANCE
TONGA - - - - - - 187

TABLE SHOWING THE ENGLISH EQUIVALENTS OF CERTAIN FOREIGN MONEYS, WEIGHTS AND MEASURES REFERRED TO.

Countries.	Foreign.	English Equivalents.
Russia	Verste	0·663 of a mile.
	Pood	36 lbs avoirdupois.
Denmark	Tonde	4·6775 bushels.
German Empire, Sweden, Holland, Belgium, France, Austria-Hungary, Finland, Norway, Portugal, Spain, Switzerland, Italy, Roumania, Bulgaria and Servia.	Metre	1·09 yard.
	Kilometre	0·621 of a mile.
	Kilogramme	2·204 lbs avoirdupois.
	Quintal, Metrique	220·4 lbs avoirdupois.
	Centner „ (Double Centner)	220·4 lbs avoirdupois.
	Metric Ton or Tonneau	2,204 lbs avoirdupois.
Greece	Ocque	2·84 „ „
	Quintal	123·2 „ „
Egypt	Cantar	99·05 „ „
United States	Short Ton	2,000 „ „
	Long Ton	2,240 „ „
China	Picul	133⅓ „ „
Japan	Kwan	8·2674 „ „
	Kin	1·3228 „ „

Foreign Money*.		English Equivalents.
		s. d.
Rouble	Prior to 1897	2 0
	From 1897	2 1⅓
Krona		1 1⅓ or 18 to the £
Mark		1 0
Franc		0 9 5/16 or 25 to the £
Peseta		
Lira		
Crown		0 10 or 24 to the £
Krona		
Korona		
Dollar (United States)		4 2

* In the majority of cases the English equivalents are given in the Reports.

EUROPE:

AUSTRIA-HUNGARY.

BUDA-PESTH.

(Coal Trade of Hungary.)

Enclosure in dispatch dated Buda-Pesth, 16th February, 1904, from Mr. Francis W. Stronge, H.B.M.'s Consul-General at Buda-Pesth.

1. For consumption of coal for ten years, 1893–1902, see Table I. Statistics of the consumption of coal on railways during the same ten years are given in Table V., as are also statistics for the year 1899 (the only year for which they are available) of the amount consumed in factories. There are no statistics of the amount consumed for domestic purposes.

2. See Tables II., III., and IV., Statistics are not available for 1903.

3. Some three or four years ago Newcastle coal used to be sent to the extent of 4,000 tons yearly to Agram (Croatia) from Fiume for the gas-works there. The quantity has since decreased to 1,500–1,800 tons yearly. Transport by rail.

4.

	s.	d.		s.	d.
Cardiff - - -	19	0	-	25	0
Newcastle - -	18	0	-	22	0
Hull and Scotch -	17	0	-	21	0

only during the Transvaal war prices rose 10s. a ton or thereabouts.

5. Yes; from 1893 to 1898 to the extent of 6,000 tons yearly, but the amount has since decreased, and is now only about 1,000 tons yearly. This is owing to the fact that fewer "outsiders" (not liners) now call at Fiume (the only Hungarian port), nearly all the trade being done by liners. Cardiff coal has the preference.

6. The statistics given in Table II. do not show a falling off during the last ten years. The fluctuations from year to year are very large in proportion to the total importation, but the whole trade is on such a small scale that it is impossible to draw any useful conclusions from these figures.

7. The railway rate for black coal from Fiume to Buda-Pesth is 1 crown 57 hellers per metric centner. There is no difference made between British and Hungarian coal, as such, but there is a difference between brown and black coal. (The Hungarian coal is mostly brown). The rates for brown coal are very low, but there are some districts in Hungary where black coal is produced, and for that there is also a cheaper rate for internal traffic than for coal imported viâ Fiume. As to the latter, there is absolutely no difference between Hungarian or any other foreign or British coal.

8. British coal might be imported either by Fiume or viâ Galatz on the Danube. In the former case, the coal could only be sold in the neighbourhood of Fiume, whereas viâ Galatz, owing to the river transport, the coal could be brought further into the country. The railway rate from Fiume to Buda-Pesth is (as stated above) 1 crown 57 hellers per metric centner, whereas from Galatz to Buda-Pesth by river the rate is about 1 crown 20 hellers per metric centner.

9. See Tables II., III., and IV.

10. There are no such duties or imposts in Hungary.

I.

CONSUMPTION OF COAL IN 1893–1902.

Year.	Production.	Import.	Export.	Consumption. Prod. + Imp.—Export.
	In Metrical Centners.			
1893	9,827,982	10,291,924	96,529	20,023,377
1894	10,373,221	10,434,065	73,376	20,733,910
1895	10,680,458	10,998,669	396,856	21,282,271
1896	11,326,248	13,073,408	409,409	23,990,247
1897	10,725,494	13,127,523	389,959	23,463,058
1898	12,394,985	13,428,446	746,541	25,076,890
1899	12,388,554	13,088,672	537,737	24,939,489
1900	13,671,897	11,096,779	1,244,147	23,524,529
1901	13,159,160	11,986,743	778,285	24,367,618
1902	10,989,266	11,089,034	357,403	21,720,897

CONSUMPTION OF BROWN COAL IN 1893–1902.

Year.	Production.	Import.	Export.	Consumption. Prod. + Imp.—Export.
	In Metrical Centners.			
1893	29,178,991	1,007,152	776,123	29,410,020
1894	31,810,715	1,599,723	835,673	32,574,765
1895	35,179,011	1,678,214	923,906	35,933,319
1896	37,737,283	1,466,163	864,039	38,339,407
1897	38,633,113	1,380,934	934,128	39,079,919
1898	42,066,941	1,234,946	1,595,475	41,706,412
1899	42,925,843	1,363,466	1,480,759	42,808,550
1900	51,282,766	1,389,030	5,189,441	47,482,355
1901	51,782,557	1,406,972	3,767,991	49,421,538
1902	51,032,365	1,121,337	3,863,491	48,290,211

CONSUMPTION OF COKE IN 1893–1902.

Year.	Production.	Import.	Export.	Consumption. Prod. + Imp.—Export.
	In Metrical Centners.			
1893	—	1,460,072	23,277	—
1894	102,502	1,557,416	39,168	1,620,750
1895	120,326	2,063,434	65,754	2,118,006
1896	155,504	2,488,469	40,362	2,603,611
1897	72,189	2,724,059	42,648	2,753,600
1898	81,902	3,148,300	39,885	3,190,317
1899	103,364	3,166,471	57,185	3,212,650
1900	129,733	3,213,621	134,534	3,208,820
1901	109,751	3,336,588	115,891	3,330,448
1902	82,037	2,810,121	107,721	2,784,437

II.

IMPORT AND EXPORT OF BLACK COAL IN THE YEARS 1893–1902.

Year.	Total.	Import from						Total.	Export to					
		Austria.	Germany.	Italy.	Great Britain.	Servia.	Holland.		Austria.	Bosnia.	Italy.	Roumania.	Servia.	Bulgaria.
	In Metrical Centners.													
1893	10,291,924	6,941,094	3,028,846	9,790	312,194	—	—	96,529	42,079	—	1,000	19,702	33,382	132
1894	10,434,065	6,575,162	3,619,893	28,532	210,478	—	—	73,376	33,994	18	25	500	28,808	9,828
1895	10,998,669	5,940,415	4,756,907	—	301,347	—	—	396,856	26,500	6,138	380	286,044	44,438	33,256
1896	13,073,408	6,773,209	5,754,883	—	545,216	—	—	409,409	28,346	4,892	360	256,835	106,275	12,701
1897	13,127,523	7,004,881	5,470,958	—	651,464	—	—	389,959	41,832	7,078	2,583	140,321	181,813	16,330
1898	13,428,446	7,502,166	5,481,079	—	426,026	—	19,175	746,541	23,648	15,816	—	429,547	234,990	42,540
1899	13,088,672	7,332,032	5,372,222	—	384,418	—	—	537,737	24,288	11,844	—	329,969	162,584	8,935
1900	11,096,779	6,043,872	4,763,542	940	261,804	16,600	—	1,244,147	882,392	13,700	4,964	201,890	123,289	17,708
1901	11,986,743	6,497,779	5,036,886	6,300	432,277	7,307	3,350	778,285	163,336	6,009	569	322,403	239,060	46,698
1902	11,089,034	5,813,023	4,649,180	8,189	569,642	49,000	—	357,403	25,509	8,700	131	158,953	139,070	25,040

III.

IMPORT AND EXPORT OF BROWN COAL 1893–1902.

Year.	Total.	Import from				Total.	Export to				
		Austria.	Bosnia.	Roumania.	Servia.		Austria.	Bosnia.	Roumania.	Servia.	Bulgaria.
	In Metrical Centners.										
1893	1,007,152	931,602	42,916	800	31,834	776,123	603,065	15	147,500	25,543	—
1894	1,599,723	1,528,503	28,443	1,160	41,617	835,673	591,944	13	202,562	41,154	—
1895	1,678,214	1,585,927	39,709	206	52,372	923,906	598,321	521	208,580	116,344	—
1896	1,466,163	1,365,911	63,442	1,074	35,736	864,039	626,916	4	175,081	62,038	—
1897	1,380,934	1,265,035	77,963	806	37,130	934,128	673,975	200	200,713	59,240	—
1898	1,234,946	1,130,829	69,016	1,040	34,061	1,595,475	878,360	2	638,991	66,161	11,861
1899	1,363,466	1,202,129	112,210	1,311	47,816	1,480,759	1,156,379	—	288,217	25,553	10,610
1900	1,389,030	1,177,306	181,597	376	29,751	5,189,441	4,844,372	100	261,489	82,654	1
1901	1,406,972	1,152,432	205,660	—	48,880	3,767,991	3,623,324	15,861	108,047	15,912	3,761
1902	1,121,337	913,736	169,480	—	38,121	3,863,491	3,745,023	—	96,420	21,620	—

IV.

IMPORT AND EXPORT OF COKE IN THE YEARS 1893—1902.

Year.	Total.	Import from					Total.	Export to					
		Austria.	Germany.	Great Britain.	Roumania.	United States, America.		Austria.	Bosnia.	Germany.	Roumania.	Servia.	Bulgaria.
	In Metrical Centners.												
1893	1,460,072	1,151,315	308,466	200	—	—	23,277	21,943	120	307	186	411	390
1894	1,557,416	993,222	563,169	1,025	—	—	39,163	38,940	10	—	100	18	100
1895	2,063,434	1,013,653	1,049,564	217	—	—	65,754	28,376	33,510	315	1,450	1,353	750
1896	2,488,469	1,396,632	1,082,863	6,614	100	2,255	40,362	7,876	29,926	—	1,070	515	975
1897	2,724,059	1,585,970	1,132,113	3,948	1,928	—	42,648	10,040	26,900	801	1,952	2,805	150
1898	3,148,300	2,023,854	1,116,594	—	7,031	—	39,885	13,211	20,505	2,700	1,630	776	1,063
1899	3,166,471	2,600,502	559,033	251	6,171	—	57,185	18,260	33,199	1,943	1,078	1,810	895
1900	3,213,621	2,590,187	618,084	5,250	—	—	134,534	63,486	38,303	3,570	9,325	5,527	5,853
1901	3,336,588	2,765,677	560,902	9,110	—	—	115,891	30,623	37,225	3,868	37,798	4,045	2,012
1902	2,810,121	2,342,699	466,062	1,360	—	—	107,721	19,683	40,822	1,923	35,281	5,374	622

V.

A.—CONSUMPTION OF COAL BY RAILWAYS IN HUNGARY IN 1893–1902.

Year.	Black Coal.	Brown Coal.	Coke.
	In Metrical Centners.		
1893	392,794	711,589	2,678
1894	535,937	576,054	2,216
1895	487,644	756,754	3,267
1896	544,227	819,339	2,818
1897	514,072	848,828	2,523
1898	761,061	626,971	2,841
1899	614,784	850,095	3,752
1900	498,551	1,141,968	2,216
1901	541,740	1,170,539	3,750
1902	429,634	1,263,505	3,112

B.—QUANTITY OF FUEL USED IN FACTORIES (EXCEPT WOOD AND CHARCOAL) IN THE FACTORIES OF HUNGARY IN THE YEAR 1899.

Name of Fuel.	Quantity consumed.	Source of Supply.		
		Hungary.	Austria.	Other Countries.
	In 1,000 Metrical Centners.			
Black Coal, Brown Coal and Briquettes - -	32,727·6	27,726·4	3,205·4	1,795·8
Coke - - - - - - - -	4,126·0	1,046·7	2,672·1	407·2

FIUME.

Enclosure in dispatch dated Fiume, 16th February, 1904, from Mr. G. L. Faber, H.B.M.'s Consul at Fiume.

1.

	English. Tons.	Native. Tons.
Steam Shipping - - -	40—50,000	—
Manufacturing - - -	10—12,000	15—20,000
Domestic - - -	—	8—10,000
Total -	50—62,000	23—30,000

2. Of English coal:
Cardiff, Newcastle, Hull, Glasgow, and Newport.

Of Native coal:
Dalmatian (Sebenico),
Istrian (Albona),
Styrian (Trifail), for domestic use.

In 1900 Turkish coal was imported, but was not a success.

3. To Agram (Croatia), where, three or four years ago, 4,000 tons Newpelton coal were sent by rail yearly for the gas works there; since reduced to 1,500 to 1,800 tons per annum.

4. Cardiff, 19s., 25s.
Newcastle, 18s., 22s.
Hull and Scotch, 17s., 21s. } In 1900 prices rose 10s.

For particulars see Table below.

5. Yes. From 1893–1898, about 6,000 tons per annum; since 1898 the quantity has decreased to 1,000 tons, owing to less tramps calling here (the trade being carried on by liners).

6. Imports of British coal fell off during the high prices ruling in 1899, 1900, and 1901, but have since regained the level of 1897, but show no signs of expansion.

For particulars see Table below.

7. Mileage rates.
No differential rates.

8. No! Considering the ruling low rates of freights, British coal could hardly be much cheaper than it is now, and cheapness is the only consideration in order to compete successfully with native coal. There are large coal deposits in Croatia, till now hardly tapped.

9. Not of British coal: only of charcoal and Sebenico (Dalmatian) coal to Italy, but the trade is not of importance.

10. There are no imposts, or duties, to affect the competition of British coal in this district or country. Prices are the only criterion. A reduction of 5s. or 6s. per ton would raise the demand effectually.

IMPORTS OF COAL AT FIUME.

Description.	1894.		1895.		1896.		1897.		1898.		1899.		1900.		1901.		1902.		1903.	
	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.	Tons.	Price.
		s. d.		*s. d.*		*s. d.*		*s. d.*		*s. d.*		*s. d.*		*s. d.*		*s. d.*		*s. d.*		*s. d.*
English - -	56,000	17 6 / 30 0	49,000	17 0 / 30 0	61,000	13 4 / 20 0	63,000	17 6 / 21 6	41,000	15 0 / 21 0	37,000	21 6 / 27 6	26,000	28 0 / 38 0	44,000	18 0 / 27 0	56,000	16 8 / 25 0	60,000	15 0 / 24 0
Istrian - -	18,000	10 0 / 21 0	14,000	10 0 / 21 6	9,000	8 0 / 20 0	14,000	9 0 / 18 0	23,500	13 4 / 17 6	27,000	8 0 / 21 6	27,000	10 0 / 26 8	29,000	11 0 / 21 0	23,000	10 0 / 19 0	15,000	9 0 / 17 6
Dalmatian -																				
Styrian - -	4,000		5,000		5,000		5,000		8,000		5,000		6,000		6,000		7,000		7,000	
Turkish - -	—		—		—		—		—		—		10,000		—		—		—	
Sundries- -	—		300		2,700		900		4,000		300		3,300		4,600		1,600		400	
TOTAL - -	78,000		68,300		77,700		82,900		76,500		69,300		72,300		84,600		87,600		82,400	

PRAGUE.

Enclosure in dispatch dated Prague, 30th January, 1904, from Captain A. Wentworth Forbes, H.B.M.'s Consul at Prague.

Source of Coal Supply.

The sources of supply are from the extensive Coalfields in Bohemia, which produced in 1902 3,807,784 tons of black or pit coal, which was 34·12 per cent. of the total production in the Empire; of this amount 13·5 per cent. was exported to Germany, Italy, and Switzerland.

Brown Coal.

The production of brown coal in 1902 was 18,262,592 tons, or 81·64 per cent. of the total production in Austria.

The following Table gives the production, export, and consumption of Bohemian brown coal in metric tons:—

	Production.	Export.	Consumed.
	Tons.	Tons.	Tons.
1899	17,900,000	8,500,000	9,400,000
1900	17,300,000	7,700,000	9,600,000
1901	18,300,000	8,100,000	10,200,000
1902	18,262,592	7,400,000	10,600,000

I am unable to give separate statistics for domestic and steam consumption.
The export is to Saxony and the neighbouring German States.

Coke.

Although coke is manufactured locally, large quantities are imported from Germany.

British Coal.

There is no market for British coal in Bohemia.

Import.

For Austria-Hungary the import of British coal was:—

	Tons.		Tons.
1893	105,418	1898	148,339
1894	113,198	1899	157,328
1895	129,250	1900	183,878
1896	152,034	1901	171,205
1897	189,246	1902	274,551

The above figures were given me by the Prague Chamber of Commerce.

SARAJEVO.

Enclosure in dispatch dated Sarajevo, 25th January, 1904, from Mr. Edward B. Freeman, I.S.O., H.B.M.'s Consul General at Sarajevo, regarding the Coal trade in Bosnia and the Herzegovina.

1. No accurate statistics are obtainable of the consumption of coal in the Consular district of Bosnia and the Herzegovina, either for domestic purposes or for manufacturing and steam purposes. As, however, all the coal consumed in these provinces, with the exception of about 9,000 metric quintals of black coal imported annually for use in ironworks and foundries, is brown coal from the mines in the country, the approximate gross consumption may be obtained by taking the output from all mines, and then deducting the amount exported ,as shown in the following Table for the five years 1898–1902.

	Output.	Exported.	Home consumption.
	Met. quin.	Met. quin.	Met. quin.
1898	2,711,835	373,256	2,338,579
1899	3,034,251	627,735	2,406,516
1900	3,945,158	970,802	2,974,356
1901	4,450,072	824,183	3,625,889
1902	4,247,531	658,826	3,588,705

2. As already stated the sources of supply are the coal mines of the country, with the exception of the black coal imported for the ironworks and foundries, which all comes from Austria-Hungary, and chiefly from the mines of Fünfkirchen in Hungary.

3, 4, 5, 6. No English coal comes to Bosnia or the Herzegovina, nor have these provinces any sea-port except Klek on the Adriatic, which is not available for mercantile purposes.

7. There is a special rate for coal, whether native or foreign, on all the railway lines in Bosnia and the Herzegovina, which are exclusively State railways. This rate is 3.2 hellers (ten hellers equal one penny) per metric ton per kilometre for truck-loads of metric tons.

8. There being no trade in British coal in Bosnia and the Herzegovina this question does not come under consideration.

9. As already shown in answer No. 2, the exports of native brown coal from Bosnia and the Herzegovina rose during the years 1898–1900 from 373,256 metric quintals to 970,802 metric quintals, but during the two years 1901–1902 fell again to 658,826 metric quintals. Statistics for 1903 are not yet published.

Black coal and coke are not exported from these provinces.

10. There is no import-duty on British or other coal, nor any drawback to free competition in the trade.

The present prices of coal in this country are :

Black coal from Hungary delivered at the frontier of Bosnia at Brod on the Save, 2·25 Austrian Crowns (1s. 10½d.) per metric quintal (220 lbs.)

Brown coal from the pit's mouth from the—

Kreka Mines, 38 hellers (3⅕d.) per met. quin.

Zenica „ 51 „ (5$\frac{1}{10}$d.) „ „

Kakanj-Doboj Mines 55 hellers (5½d.) per met. quin.

At these prices it is quite impossible for British coal, in spite of its superiority, to compete with either the black coal from Hungary or the native brown coal.

TRIESTE.

Enclosure in dispatch dated Trieste, 30th January, 1904, from Mr. J. A. Nathan, H.B.M.'s Acting Consul at Trieste.

1. Domestic purposes, almost nil. Manufacturing and Gas Works, about 150,000 tons. Steam, about 180,000 tons.

2. Great Britain, Austria-Hungary, United States, Germany, Belgium, and Turkey, as follows, viz. : —

	1893.	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain - -	96,325	103,806	130,411	165,355	189,890	167,353	166,883	129,304	146,475	265,922
Austria-Hungary -	59,349	54,588	52,227	50,465	50,716	87,643	69,706	83,280	61,511	55,112
Germany and Belgium	—	40	4,627	2,731	2,110	—	—	—	—	—
Turkey - - -	—	—	—	—	—	611	—	21,139	20,669	6,370
United States - -	—	—	—	—	—	—	—	44,513	53,689	9,013

NOTE.—The statistics for the year 1903 are not as yet compiled, therefore the ten years are given from 1893 to 1902.

3. About fifty miles, but a small quantity principally for gas works, by railways, and native sailing crafts.

4. The following are the highest and lowest prices, viz :—

	1894.		1895.		1896.		1897.		1898.	
	highest.	lowest.	highest.	lowest.	highest.	lowest.	highest.	lowest.	highest.	lowest.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Cardiff - - -	20 10	17 6	19 7	16 3	19 2	15 10	19 7	16 3	24 2	20 10
Newcastle- - -	19 2	15 2	17 6	14 2	17 1	13 9	17 6	14 2	21 8	18 9
Lancashire & Yorkshire	18 4	15 0	16 8	13 4	16 5	13 1	17 3	13 11	21 3	17 11
Scotch - - -	16 8	13 4	15 10	12 6	15 6	12 6	16 5	13 1	19 7	16 3
Istrian (Austrian) -	19 2	15 10	18 4	15 0	18 4	15 0	18 6	15 2	21 3	18 1
Dalmatian (Austrian)	15 0	11 8	14 2	10 10	14 2	10 10	14 2	10 10	15 0	11 8

	1899.		1900.		1901.		1902.		1903.	
	highest.	lowest.	highest.	lowest.	highest.	lowest.	highest.	lowest.	highest.	lowest.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Cardiff - - -	27 6	24 2	32 1	29 1	30 0	26 8	24 2	20 10	21 8	18 4
Newcastle - -	25 0	22 1	30 0	26 8	24 2	20 10	20 10	17 6	19 2	15 10
Lancashire & Yorkshire	24 2	21 3	29 2	25 10	22 6	19 2	19 2	15 10	17 6	14 2
Scotch - - -	23 1	19 7	27 6	24 2	21 8	18 4	17 1	13 9	17 1	13 9
Istrian (Austrian) -	24 7	21 3	25 0	21 8	22 6	19 2	21 3	18 1	20 0	16 8
Dalmatian (Austrian)	18 4	15 0	18 4	15 0	17 6	14 2	15 5	12 1	15 10	12 6
United States - -	—	—	30 0	26 8	29 2	25 10	19 2	15 10	18 4	15 0

The above prices are for alongside; for delivery into railway trucks alongside vessel the charge is fivepence per ton extra.

The prices for the other kinds of coal are not obtainable; as the business is done direct between the mine owners and consumers, the prices are not made public.

5. Hardly any, as the prices are too high compared with the prices ruling at Port Said, Malta, Algiers, and Constantinople.

6. The import of British coals during the ten years from 1893 to 1902 increased continually, with the exceptions of the years 1900 and 1901, when in consequence of the high prices, due to strikes in Great Britain, coal from the United States was for the first time imported into Austria.

7. There are no differential rates charged; all kinds of coal pay equal tariff rates.

8. It is simply a question of price; the cheaper the British coal the greater would be the demand for it.

9. There is no export of coal or coke from Trieste, except in small quantities for inland.

10. There is no duty charged on coal, nor any other import. The mine-owners in Austria, as a rule, maintain their high prices, even when the prices of British coals are lower, on account of the Austrian Government compelling the subsidised concerns, such as the Austrian Lloyds S.N. Co. to use a certain proportion of native coal on board their steamships and in their dockyards. The import of British coke had diminished since the year 1898 from 32,161 tons to 8,192 tons in the year 1902.

VIENNA.

Enclosure in dispatch dated Vienna, 9th February, 1904, *from Mr. P. von Schoeller, H. B. M.'s Consul-General at Vienna.*

NOTE.—The figures relating to the production of coal apply to Austria exclusively, whereas those dealing with the export and import of coal include Hungary as well.

Austria-Hungary and Germany stand in the unusual position of supplementing each other's deficiencies in coal, so that the large export of brown coal (chiefly from Bohemia) to neighbouring German districts is more than counterbalanced by the import from Germany (chiefly Prussian Silesia) of ordinary coal.

The trade in coke between the two countries is also very large, but here again Germany sends to Austria alone more than Austria to Germany, Russia, and other countries all put together.

1. It is not possible to quote the annual consumption of coal in this consular district, or the quantity used for domestic and manufacturing purposes respectively, no statistics being available.

For the municipal district of Vienna the coal and coke delivered from the various stations to persons within the district amounted in 1901 to about 1,940,000 tons, and in 1902 to 1,808,000 tons. These figures show a noticeable decline, and are a sure indication of a decrease in the amount of coal used for manufacturing purposes.

The average price of coal for 1902 delivered at the Northern Railway Terminus, Vienna, was 1s. 9d. per 100 kilos in truck loads, and 1s. 10d. per 100 kilos from the short (? for smaller quantities).

2. The import of coal is almost exclusively from Germany; the seaports alone (*e.g.*, Trieste, Fiume) receive coal from Great Britain in relatively small quantities—about 3% of the total amount of coal imported. The price can only be known at the seaports affected.

7. There are no differential rates for British coal in Austria.

10. There is no duty on imported or exported coal in Austria-Hungary.

PRODUCTION OF COAL, AUSTRIA.

(Austrian ton = 2,200 lbs. av.)

		Tons.	£
1892	Coal	9,241,126	2,640,002
	Brown Coal	16,190,273	2,508,074
1893	Coal	9,732,650	2,795,820
	Brown Coal	16,815,954	2,837,348
1894	Coal	9,572,951	2,765,224
	Brown Coal	17,332,538	2,690,832
1895	Coal	9,722,678	2,842,032
	Brown Coal	18,389,147	2,910,294
1896	Coal	9,899,521	2,937,910
	Brown Coal	18,882,536	3,018,966
1897	Coal	10,492,770	3,200,405
	Brown Coal	20,458,092	3,340,368
1898	Coal	10,997,521	3,428,499
	Brown Coal	21,083,360	3,624,399
1899	Coal	11,455,138	3,729,176
	Brown Coal	21,751,794	3,965,311
1900	Coal	10,992,544	3,982,955
	Brown Coal	21,539,917	4,693,065
1901	Coal	11,738,839	4,569,025
	Brown Coal	24,473,509	5,216,148

EXPORT OF COAL—AUSTRO-HUNGARY.

(Austrian ton = 2,200 lbs. av.)

		Germany.	Other Countries.	Total.
1894	Brown Coal	6,835,426	66,967	6,902,293
	Coal	495,311	129,358	624,669
	Coke	12,594	97,964	110,558
1895	Brown Coal	7,071,594	38,771	7,110,365
	Coal	517,361	122,401	639,762
	Coke	20,714	98,335	119,049
1896	Brown Coal	7,530,784	31,936	7,562,720
	Coal	545,620	112,747	658,367
	Coke	28,405	88,202	116,607
1897	Brown Coal	8,081,313	27,661	8,108,974
	Coal	577,760	124,158	701,918
	Coke	31,175	113,870	145,045
1898	Brown Coal	8,321,935	30,019	8,351,954
	Coal	578,982	261,522	840,504
	Coke	33,858	160,463	194,321
1899	Brown Coal	8,630,390	32,267	8,662,657
	Coal	596,497	282,959	879,456
	Coke	42,443	210,497	252,940
1900	Brown Coal	7,826,676	37,543	7,864,219
	Coal	560,724	254,962	815,686
	Coke	37,570	225,222	262,792
1901	Brown Coal	8,026,201	50,355	8,076,556
	Coal	554,931	192,720	747,651
	Coke	32,801	271,021	303,822
1902	Brown Coal	7,827,891	60,405	7,888,296
	Coal	550,516	140,173	690,689
	Coke	30,911	203,999	234,910
1903	Brown Coal	7,962,452	58,713	8,021,165
	Coal	631,518	106,257	737,775
	Coke	30,636	248,972	379,608

IMPORT OF COAL—AUSTRO-HUNGARY.

(Austrian Ton = 2,200 lbs. av.)

		Germany.	Great Britain.	Other Countries.	Total.
1894	Coal	3,923,111	113,198	11,956	4,048,265
	Coke	434,840	1,691	726	437,257
1895	Coal	4,362,186	129,250	11,565	4,503,001
	Coke	524,181	8,572	648	533,401
1896	Coal	5,007,103	152,064	15,154	5,174,321
	Coke	481,218	8,144	1,664	491,026
1897	Coal	4,902,953	189,245	29,275	5,121,473
	Coke	525,298	6,831	1,333	533,462
1898	Coal	5,193,785	148,339	54,614	5,396,738
	Coke	567,584	37,570	1,628	606,782
1899	Coal	5,110,507	157,328	29,493	5,297,338
	Coke	539,309	18,289	6,405	564,003
1900	Coal	6,010,831	183,878	48,229	6,242,938
	Coke	606,423	11,700	2,653	620,776
1901	Coal	5,614,116	164,099	49,116	5,837,331
	Coke	566,675	12,440	33,093	612,208
1902	Coal	5,418,361	274,550	73,464	5,766,375
	Coke	504,629	12,640	30,117	547,386
1903	Coal	5,522,233	271,574	93,665	5,887,472
	Coke	492,300	8,181	14,470	514,951

BELGIUM.

ANTWERP.

Enclosure in dispatch dated Antwerp, 26th February, 1904, *from Mr. E. Cecil Hertslet, H.B.M.'s Consul-General at Antwerp.*

1. *See Table* 1.

There appears to be no means of ascertaining the quantity of coal used for domestic purposes, as distinguished from that consumed for manufacturing or steam purposes.

The quantity of British coal used for domestic purposes is small, and is practically restricted to anthracite coal. Belgian coal is used for cooking purposes.

2. *See* Tables II. and III.

3. During the strike, and for some time afterwards, British coal in large quantities was imported into Belgium, not only for manufacturing purposes at Liége and Charleroi, but for the use of the State Railways. At the present time, however, British coal appears to be used only in moderate quantities by certain manufacturers in the neighbourhood of Ghent and Bruges. British coal is also consumed by the Gas Works at Brussels and at Malines, but not in such large quantities as formerly.

There is every facility for transportation in Belgium, either by canal or railway.

4. The precise figures for the period mentioned are not obtainable, but 13s. and 27s. 6d. may be taken as being approximately correct.

5. The figures are not obtainable.

The importation of British coal to Antwerp for shipment into bunkers is a very uncertain factor. Large shipping companies prefer to obtain coal direct from the Continental collieries by truck, and for coal by lighter the Germans are able to deliver here at a considerably cheaper rate than coal can be supplied from the United Kingdom.

6. As will be seen from Table II., the quantity of coal and coke imported into Belgium from the United Kingdom has considerably fallen off during the past three years.

Belgium is an important coal-producing country, and prices fluctuate in sympathy with the demand. During the period above mentioned prices have steadily declined, principally in consequence of the competition of German coal, and this is undoubtedly the cause of the decrease in the imports of coal from the United Kingdom. It seems evident, therefore, that unless Germany can find better markets for the surplus of the output of her mines, the competition will not only continue, but will increase, greatly to the detriment of British coal.

7. The railway rate for coal and coke, say to Brussels, from the Quay side at Antwerp is Frs. 2.88 per ton, and to Liége, Frs. 4.20 per ton. There are no differential rates for British coal as compared with native coal, or that imported from other countries.

8. So long as the powerful Westphalian Syndicate, whose object appears to be to drive British coal out of the Belgian market, continues to supply coal at a much less cost than the British coal-owner can afford to do, imports from the United Kingdom will necessarily fall off. In Germany the home consumer is charged a sufficient price to cover the cost of production, so that whatever the surplus realises is clear profit. It is difficult to suggest a remedy for this state of affairs.

9. *See* Tables IV. and V.

10. Coal and coke are admitted free into Belgium.

TABLE I.

Coal Consumption.

Statement showing consumption of coal (native and imported) during the years 1894 *to* 1901 *inclusive.*

	1894.	1895.	1896.	1897.
	Tons.	Tons.	Tons.	Tons.
Native Coal - - - - -	15,995,000	15,789,000	16,603,000	17,044,000
Imported Coal - - - -	1,377,000	1,539,000	1,693,000	2,017,000
Total - - - - -	17,372,000	17,319,000	18,296,000	19,061,000

	1898.	1899.	1900.	1901.
	Tons.	Tons.	Tons.	Tons.
Native Coal - - - - -	17,509,000	17,504,000	18,382,000	17,393,000
Imported Coal - - - -	2,202,000	2,844,000	3,288,000	2,930,000
Total - - - - -	19,711,000	20,348,000	21,670,000	20,323,000

TABLE II.

COALS IMPORTED INTO BELGIUM.

Statement of Coals imported into Belgium during the years 1894 *to* 1903. *The Unit quoted is* 1,000 *tons.*

Origin.	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
Great Britain - - -	307	320	326	384	342	777	1,173	756	626	587
France - - - - -	350	431	431	567	603	604	497	330	452	576
Holland - - - - -	4	5	6	0	2	10	40	37	52	59
Germany - - - - -	714	773	928	1,061	1,253	1,452	1,573	1,755	2,100	2,324
Other Countries - -	2	1	2	5	2	1	5	2	2	2
	1,377	1,530	1,693	2,017	2,202	2,844	3,288	2,930	3,232	3,548

COKE IMPORTED INTO BELGIUM—1894 TO 1903.

Origin.	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
Great Britain - - -	—	—	1	6	0	40	40	5	0	1
France - - - - -	9	15	20	20	24	33	25	15	19	30
Germany - - - - -	316	347	237	242	154	221	220	132	210	277
Other Countries - -	1	0	1	1	2	1	2	1	1	1
Total - - -	326	362	259	269	180	295	287	153	230	309

TABLE III.

SOURCES OF SUPPLY.

Year.	Home Production.	Imports.
	Tons.	Tons.
1894	20,534,000	1,377,000
1895	20,450,000	1,530,000
1896	21,252,000	1,693,000
1897	21,492,000	2,017,000
1898	22,088,000	2,202,000
1899	22,072,000	2,844,000
1900	23,642,000	3,288,000
1901	22,213,000	2,930,000
1902	22,769,000	3,232,000
1903	23,871,000	3,548,000

TABLE IV.

BELGIAN COAL—EXPORTS.

Statement showing Exports of Belgian Native Coal from the Year 1894 *to* 1903 (*inclusive*).

The Unit used in the following Table is 1,000 *Tons.*

Year.	1894	1895	1896	1897	1898	1899	1900	1901	1902	1903
Great Britain	101	73	94	117	139	112	86	37	50	93
Argentine Republic	—	—	5	10	17	12	—	10	4	4
Australia	2	—	4	2	—	6	6	6	15	28
Brazil	3	5	8	8	14	5	3	8	8	15
Canada	—	5	—	4	4	—	3	—	—	—
Chile	37	29	36	43	35	31	25	10	37	30
China	—	—	—	—	—	—	20	5	6	6
Cuba	—	—	—	—	—	—	3	—	—	—
Congo	—	—	—	—	—	5	11	6	9	4
Denmark	3	—	—	—	—	—	—	—	—	—
Egypt	—	—	—	2	5	6	4	7	4	15
France	3,559	3,632	3,499	3,223	3,255	3,284	3,917	3,832	3,962	3,655
G.D. Luxembourg	234	248	320	322	337	360	427	168	179	199
Germany	226	266	219	213	232	280	286	302	308	319
Holland	218	247	309	361	344	299	307	255	292	296
India	10	4	6	2	4	2	—	7	9	11
Italy	6	5	9	—	16	4	—	2	5	6
Mexico	—	—	—	—	50	2	—	2	6	6
Russia	16	15	18	14	17	13	3	6	3	5
Spain	—	—	3	4	7	5	6	12	15	13
Sweden	9	6	11	12	10	9	5	4	9	10
Switzerland	41	67	52	54	47	42	47	84	81	67
Turkey	6	3	2	3	6	5	3	5	7	9
United States	15	11	20	37	35	51	63	37	52	91
Uruguay	18	16	5	—	—	—	—	1	1	—
Other Countries	35	29	24	27	40	35	35	14	14	—
Total	4,539	4,661	4,649	4,448	4,579	4,568	5,260	4,820	5,078	4,827

TABLE V.

BELGIAN COKE. EXPORTS.

Exports of Belgian Coke from the year 1894 *to the year* 1903 *inclusive.*

The Unit shown in the following Table is 1,000 *Tons.*

	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
Great Britain	20	—	—	—	—	—	—	6	10	6
Denmark	7	—	—	—	—	—	—	—	—	—
France	487	385	510	554	590	582	646	449	406	361
G. D. Luxemburg	206	225	159	184	137	245	251	23	13	14
Germany	154	146	87	85	61	104	104	47	29	30
Holland	39	66	53	61	44	36	41	9	7	6
Italy	—	8	12	5	12	15	4	2	2	3
Mexico	—	—	—	—	—	—	—	—	1	—
Switzerland	5	10	17	13	11	14	16	13	11	6
Spain	—	—	—	—	—	—	—	33	30	19
Turkey	—	—	—	—	—	—	—	4	17	18
United States	6	9	9	2	8	5	5	81	84	88
Other Countries	30	21	16	5	14	7	6	47	61	72
	947	870	863	909	878	1,008	1,073	714	671	623

DENMARK.

AARHUS.

Extract from dispatch dated Aarhus, 1*st February,* 1904, *from Mr. G. F. Stark, H. B. M.'s Consul at Aarhus.*

As the Statistics as regards import, export, etc., of coals at this port are not retained here, but are sent in to Copenhagen periodically, I have conferred with H.M. Consul there, Captain Boyle, with the view of avoiding any misunderstanding.

Captain Boyle has now sent me a copy of his Report, which includes the whole of Denmark, and which, so far as I can see, is the only way in which it is possible to give reliable answers, and I presume therefore, that no Report will now be required from me.

COPENHAGEN.

Enclosure in dispatch dated Copenhagen, 1*st February* 1904, *from Captain James Boyle, H.B.M.'s Consul at Copenhagen.*

1. The annexed Table A gives the figures of consumption of coal in Denmark during the years 1894–1902. No statistics exist of what the coals consumed have been used for. A leading coal merchant here gives the following estimates; about one-fifth for domestic and four-fifths for manufacturing and steam purposes. In former times comparatively more was used for domestic purposes; but at present coals are used in so many dairies, slaughter-houses, threshing machines, and for other agricultural purposes. The only figures that can be ascertained are the consumption figures of the Danish State railways, which, during the fiscal years 1901–2 and 1903–3, amounted respectively to 146,147 tons and 142,698 tons.

2. The annexed Table A gives total imports, and imports from Great Britain. It will be seen that almost all coals imported come from Great Britain. The import of coals from Germany is only about 1 or 2 per cent. of the imports. Two years ago an experiment was made to import Canadian and United States coals, but only a few cargoes came over, and such import can, on account of the difference in freight, only take place in very exceptional cases.

3. Coals are used all over Denmark, and there are facilities for transportation everywhere by rail or coasting vessels.

4. Vide annexed Table B showing prices for Copenhagen and Danish provinces. These prices include the import duty of 1s. per ton and expenses incurred for discharging cargoes on arrival at a Danish port.

5. The figures giving exports of coals in annexed Table A show the quantity that has been used for bunker coals during the years in question, as there is no other export of coals from Denmark. British vessels take about one-third of the bunker coals, and the proportion would be higher if they were not able, before commencing long voyages, to go to Newcastle, Cardiff, or other British ports to coal.

6. The quantity of British coal imported has not fallen off, as will be seen from the annexed Table A. The import of British coke has also increased.

7. Railway rates chargeable on all coals in Denmark are 1d. per cwt. per distance of 55 miles.

There are no differential rates for British coals as compared with other imported coals. The German railways make concessions in their rates on coal exported.

8. The British coal trade in Denmark will undoubtedly be increased in proportion as Denmark's trade and industry increases, especially if the British export tax on coals is not increased.

9. Only bunker coals. The export increases in proportion as shipping increases.

10. German coals are not handicapped by any export tax as the British coals, but their quality is very bad and they are unsuitable for most purposes. Import duty on all coals in Denmark is 1s. per ton.

TABLE A.

Coals.	Total Imports.	Imports from Great Britain.	Consumption in the Country.	Exports.
	Tons.	Tons.	Tons.	Tons.
1894	1,553,909	1,494,253	1,320,840	123,873
1895	1,615,701	1,573,118	1,478,771	125,616
1896	1,672,245	1,610,301	1,553,835	119,837
1897	1,841,115	1,821,044	1,677,778	149,847
1898	1,931,423	1,900,464	1,724,575	168,958
1899	2,056,930	2,001,580	1,900,450	199,416
1900	2,091,117	2,052,175	1,854,255	185,756
1901	2,152,097	2,105,219	1,930,758	214,302
1902	2,166,893	2,073,213	1,980,560	196,431
1903	Figures not yet available.			

NOTE.—In the figures for 1894, 1895, and 1896 the amounts include the figures for coke. Since then coke has been under a separate heading. The import of coke was, in 1897, 66,992 tons, and is estimated to have been about the same during the three previous years.

TABLE B.

PRICE OF IMPORTED COAL.

I.—COPENHAGEN.

		Best Northumberland.	Scotch.	Derbyshire.	Cardiff.
		s. d.	s. d.	s. d.	s. d.
1893	Highest	19 0	19 3	18 9	—
	Lowest	14 6	15 6	16 6	—
1894	Highest	19 0	17 9	17 6	19 6
	Lowest	16 0	15 3	15 9	16 10
1895	Highest	15 11	14 1½	15 3	18 6
	Lowest	15 0	13 6	15 0	16 0
1896	Highest	14 8	14 0	15 0	16 9
	Lowest	13 9	13 7½	13 9	15 9
1897	Highest	14 3	15 3	15 9	18 6
	Lowest	13 0	14 6	—	16 2
1898	Highest	18 6	18 6	18 9	21 6
	Lowest	15 6	13 10	15 0	18 0
1899	Highest	19 0	19 9	21 3	21 0
	Lowest	17 6	16 9	18 9	19 3
1900	Highest	23 3	28 0	27 0	29 6
	Lowest	21 0	18 6	18 4½	26 10
1901	Highest	20 9	19 3	20 0	27 0
	Lowest	17 6	17 1½	19 0	22 3
1902	Highest	18 4½	18 4½	19 3	23 0
	Lowest	18 0	16 9	19 6	19 6
1903	Highest	18 6	18 0	19 6	21 3
	Lowest	17 5	17 7½	18 9	19 9

II. DANISH PROVINCES.

——	——	German.	Northumberland.	Scotch.	S. Yorkshire.	Welsh.
		s. d.	s. d.	s. d.	s. d.	s. d.
1893	Highest	—	19 3	16 6	18 0	—
	Lowest	—	15 9	15 1½	17 9	—
1894	Highest	—	19 0	16 9	19 3	Smokeless 19 6
	Lowest	—	16 6	15 3	17 6	Newport 16 10
1895	Highest	—	15 7	15 6	17 1	Newport 15 0
	Lowest	—	15 3	14 9	16 0	—
1896	Highest	—	14 4½	14 6	16 6	Newport 15 9
	Lowest	—	13 10	13 5	15 7½	Newport 14 9
1897	Highest	—	16 5	15 0	16 9	Newport 16 5
	Lowest	—	13 10	14 7½	16 0	Newport 14 9
1898	Highest	—	19 5	17 9	20 9	Newport 19 0
	Lowest	—	16 9	16 9	17 0	Newport 18 2
1899	Highest	—	19 6	21 9	—	Newport 21 11
	Lowest	—	18 0	17 9	—	Newport 19 2
1900	Highest	—	28 0	28 0	29 0	Smokeless 28 0
	Lowest	—	26 0	19 0	27 6	—
1901	Highest	—	21 6	18 6	22 6	Smokeless 23 9
	Lowest	—	17 0	—	19 0	Smokeless 22 10
1902	Highest	19 9	19 0	17 6	20 3	Smokeless 19 7
	Lowest	19 0	18 4½	—	20 0	Smokeless 21 0
1903	Highest	20 3	18 6	17 4½	20 10½	—
	Lowest	19 0	17 4½	—	19 6	19 3

FAROE ISLANDS.

Enclosure in dispatch dated Faroe Islands, 10th February, 1904, from Mr. H. M. Villiers, H.B.M.'s Consul at the Faroe Islands.

1. Estimated present consumption of coal per annum:—

Domestic - - -	975 tons.	
Five whaling stations	2,900 ,,	Steam purposes 3,500 tons.
One factory - - -	100 ,,	
One local steamer	500 ,,	

2. Great Britain.

3. No inland habitations exist. No demand. No transportation facilities.

4. No railways exist.

Price of coal for domestic purposes into lighters in harbour is:—

Price paid for coal in Great Britain with 10s. or 11s. ocean freight per ton added; but if the vessel has been chartered to come to export fish, they sometimes arrive with coal (as ballast), and then about 7s. should be added to cost (instead of 10s.)

About 200 tons is brought to the Islands in autumn by Færöese fishing smacks on their return voyage from Great Britain; the price of this coal is very variable.

The whaling stations ashore import their own coal in their own vessels.

The owner of the local steamer referred to has two other steamers, which latter obtain coal in Great Britain for themselves and the third steamer.

Most of the coal "ordinary household" is obtained from the Firth of Forth, at about 14s. per ton. This is retailed here at about 32s. per ton.

There are coal deposits on the Island of Suderö (Færöe Islands); but the undertaking has never yet become a commercially sound affair. About fifty tons of this coal was sent to Thorshavn in 1902, and sold for a trifle, but created no demand.

5. Insignificant amount. Occasionally a British fishing vessel purchases sufficient for voyages to England, if it has been accidentally detained here.

6. Not fallen off.

7. No railways.

8. The whole trade of the Islands ought to be carried on in British bottoms, with Great Britain as the source of supply, being the nearest market. No British trading vessels ever come here. Cf. Annual series, Consular Reports to Foreign Office, May, 1903.

9. None. Promoters of Mining Company hope to export Suderö coal, but there is no evidence of their being able to realise their hopes.

10. No duties. It is to me inexplicable that Great Britain totally ignores this market. Numbers of British fishing vessels frequent the harbours, and fish profitably in adjacent waters; otherwise, commercially, Great Britain seems to ignore the existence of this place which is only 200 miles distant from her shores. British trading vessels ought to bring coal and general merchandise, and receive dried fish, wool, &c., &c., as exports.

REYKJAVIK (ICELAND).

Enclosure in dispatch dated Reykjavik, 10th February, 1904, from Mr. J. Thorwaldsson, H.B.M.'s Acting Consul at Reykjavik.

1. The present approximate consumption of coal per annum in this Consular district is about 20,000 tons, of which about one-tenth is used for steam purposes.

2. The sources of supply are, and have always been, exclusively British.

3. The greater part of the coal consumed in Iceland is used in the towns all round the coast. The proportionally small amount consumed in the interior of the country is transported by means of horses, as there are no railways in Iceland,

4. The highest prices obtained for British coal delivered alongside vessels have been 35 shillings per ton, and the lowest 25 shillings (for the best North Country coal).

5. British steam trawlers are occasionally supplied with coals, but the proportion cannot be exactly given.

6. The quantity of British coals imported into this Consular district has increased during the last ten years, the reason being the growth of the towns.

7. There are no railway rates.

8. The British coal trade in this district could best be increased by establishing a coaling station on a large scale at Reykjavik, the heavy freight on the coal, imported in small vessels, being a great drawback in the present coal trade here.

9. There are no exports of coal or coke from this Consular district.

10. There are no import duties or other imposts on coals up here.

ST. THOMAS.

Extract from dispatch dated St. Thomas, 9th February, 1904, from Mr. Herman McDougal, H.B.M.'s Consul at St. Thomas.

The total amount of coal imported was during last year 68,311 tons, of which Great Britain supplied 10,112 tons, and the United States of America supplied 54,523 tons, also Germany supplied 1,976 tons, and the small difference was made up in various ways by other countries.

The American coal is principally used by the French and German steamship lines regularly running here, and taken from their coal depôts, and is also sold by the only coal merchants, who sell to ships of war and stray steamers.

The English coal is used by the Royal Mail Steam Packet Company (who also use American coal) and taken from their coal depôts; and this coal is also sold by the coal merchants here.

American coal is sold at 26s. per ton, and British coal at 32s. per ton.

There are no mines to export coal here, and none is used on shore, except at one steam factory where the consumption is not great.

Coal is transferred from steamers to jetties by baskets on heads of labourers, and sold in the same way.

FRANCE.

AJACCIO.

Enclosure in dispatch dated Ajaccio, 4th February, 1904, from Mr. W. J. Holmes, H.B.M.'s Consul at Ajaccio.

1. About 1,600 tons, of which 1,200 tons, imported from Newcastle, are used by the local gas works, and 400 tons (French briquettes and Cardiff Patent Fuel) for steam purposes.

2. From 1892 to 1900 British coal was imported from Genoa in Italian sailing vessels; from 1900 to 1902 from Newcastle in British vessels; in 1903 from Newcastle in a German ship.

3. There is no consumption of coal in the interior of Corsica.

4. In 1892 the price paid for British coal (kind not known) was 39 francs (31s. 2d.) per ton of 1,000 kilos (19½ cwts.) From 1893 the price rose gradually, till in 1900 it reached 49 francs (39s.). In 1903 the price had again fallen to 39 francs. During this period, French coal (briquettes) experienced the same rise and fall—that is briquettes from the Department of Gard cost 39 francs per ton in 1892, 49 francs in 1900, and 39 francs in 1903. Briquettes from the Department of Loire cost 43 francs (34s.) in 1892, 53 francs (42s.) in 1900, and 43 francs in 1903.

5. At Bastia only (q.v.)

6. The quantity has not diminished at Ajaccio.

7. No coal is carried by rail.

8. There appears to be no reason for thinking that the existing trade will not be maintained. Excepting at Bastia, the demand in Ajaccio and in Corsica generally is fully covered by the present supply.

9. No coal is exported.

10. The import duties on British and other foreign coal amount to 1.60 francs (1s. 3d.) per ton of 1,000 kilos (19½ cwts.) French coal alone pays 40 centimes (3¾d.) per ton and benefits thus to the extent of 1.20 francs (11½d.) per ton.

ALGIERS.

Enclosure in dispatch, dated Algiers, 23rd March, 1904, from Mr. F. J. S. Hay-Newton, H.B.M.'s Consul-General at Algiers.

1. 1903. Manufacturing for steam purposes (local) 73,000 tons. In the above is included consumption by railways. Re-exported, *i.e.*, Welsh coals imported into the country in bond, or "*entrepôt fictif*" and re-exported for ship's bunker's, 594,000. Domestic purposes, *i.e.*, household, 1,000.

2. Great Britain principally. This country's imports of coal equals about 97 per cent. of the total.

3. British coal or manufactured combustible has penetrated as far south as Biskra, about 200 miles, and is principally utilised through the whole service of railways in the provinces of Algiers, Oran and Constantine.

4. 1894, 18s.; 1895, 17s. 6d.; 1896, 16s.; 1897, 15s. 6d.; 1898, 18s.; 1899, 22s. 6d.; 1900, 25s.; 1901, 25s. 6d.; 1902, 22s.; 1903, 18s.

NOTE.—the above refers to the price of coals free into bunker from lighters. 80 per cent. of such coal would be Welsh coal, 15 per cent. North Country coal, and 5 per cent. Belgian or American.

5. About 85 per cent, of the total imports are exclusively for the bunkers of British vessels.

6. Manufacturing or steam purposes. The increase in the imports for this purpose has been normal in the last ten years, ranging from 60 to 70,000 tons per annum, principally manufactured combustible. Of late years there has been a decrease in the quantity of British manufactured combustible, and an increase in the quantity of Belgian and German combustible, which appears to be due to the export tax in Great Britain.

7. There are no differential rates, there being a general tariff dependent upon mileage.

8. The export tax of 1s. per ton or the tax *pro rata* on manufactured combustible is prejudicial to the British manufacture *vis à vis* with the Continental manufacturer, who can supply a combustible at a price inferior by that tax, as it is to be remarked that prior to the imposition of this tax combustible of British manufacture was exclusively consumed.

9. There are no true coal-fields in North Africa, that is, none have yet been discovered.

10. An import tax of 1.20 franc is imposed upon all combustible coming from countries other than from France and for local consumption. Combustible introduced for re-exportation, *i.e.*, ship's bunkers, enters free of any duty.

MEMORANDUM.—90 per cent, of the whole of the coals introduced into this port for bunker purposes, amounting to nearly 600,000 tons per annum, are re-exported or supplied to British ships. Hence the tax of 1s. per ton made at the British port of shipment is really borne by the British consumer, as the coal depot owners first paying the tax to their British seller augment their supply price to the British ship-owner by an amount equal thereto.

AMIENS.

Enclosure in dispatch, dated Calais, 2nd February, 1904, from Mr. C. A. Payton, H.B.M.'s Consul at Calais.

Report of Mr. R. Johnson, Vice-Consul at Amiens.

1. Consumption of coal for manufacturing purposes in this town is estimated at about 200,000 tons per annum.

2. Coal consumed in this locality comes from collieries in the Pas-de-Calais District.

3. Little, if any, British coal comes to this city, and none from other countries.

4. The distance from Pas-de-Calais collieries is only about fifty miles, hence competition seems impossible.

5. Railway rates to Ameins are, from Boulogne about 4s., Tréport 3s., St. Valéry-sur-Somme 2s. 3d. per ton.

6. No exportation of coal or coke.

7 to 10. No information available.

ANTANANARIVO (MADAGASCAR).

Enclosure in dispatch, dated Antananarivo, 25th April, 1904, from Mr. T. P. Porter, H.B.M.'s Consul at Antananarivo.

1. Consumption of coal from 1897 to 1902:—

572 tons in	1897.	6,168 tons in	1900	landed at Majunga.
6,118 „	1898.	1,322 „	1901	
2,520 „	1899.	4,739 „	1902	

Prior to 1897 no stock was kept at Majunga.

2. Ninety per cent. was Patent Fuel from France, and ten per cent. English Coal.

3. No coal has yet been brought inland, but on completion of the railway from the east coast (in two years time) it will no doubt come into use both for railway and manufacturing purposes. At present charcoal and wood are employed.

4. The highest price is 48s. per ton and the lowest 32s. delivered alongside. A British schooner now at Majunga brought for sale 50 tons of Newcastle steam coal, which after great difficulty was disposed of at 32s. per ton.

5. None.

7. The railway from the east coast has not yet entered this district, but will probably reach its western extremity in 1905.

8. & 9. No.

10. There is no imposition placed upon British coal which would affect its competition with that of other countries.

The above information is supplied by Mr. Cantal, Acting Vice-Consul at Majunga.

"There is a considerable difference between the prices herein quoted and those given by the late Mr. Knott, Vice-Consul at Majunga, in a Return dated 7th January, 1904. In this, Mr. Knott stated the average prices of coal to be from 55s. to 60s. per ton. I have called the attention of Mr. Cantal to this discrepancy."—(*Extract from Mr. Consul T. P. Porter's dispatch, dated Antananarivo, 25th April,* 1904.)

BASTIA (Corsica).

Enclosure in dispatch, dated Ajaccio, 4th February, 1904, from Mr. W. J. Holmes, H.B.M.'s Consul at Ajaccio.

Report of Mr. Arthur C. Southwell, Vice-Consul at Bastia.

1. The present importation of coal at Bastia is about 7,500 tons per annum. Of this, under 1,500 tons is Gas Coal, about 5,000 tons is consumed by the railway, and the rest is for local steam purposes and bunkering steamers. There is no domestic consumption.

2. During the last ten years the source of supply has been Great Britain, with the exception of one cargo of about 2,000 tons of Belgian Patent Fuel purchased during the strike in Wales, which proved very unsatisfactory.

3. There is no consumption of coal in the interior of the island.

4. Prices are not reported here except for small purchases. The purchases for Gas Works are made by the owners in London and for the Railway by the Company in Paris.

5. Only insignificant quantities are shipped for bunkers of British steamers, this not being a coaling port.

6. There has been no falling-off in imports.

7. There is no movement of coal to the interior.

8. The trade is well looked after by British merchants.

9. Coal is not exported. The gas works export their surplus coke to Italian ports, but the quantity is insignificant.

10. Import duty of 1.20 francs per ton of 1,000 kilos is levied on coal from all foreign countries. French coal which does not pay duty cannot however compete, as freight from Marseilles to Bastia is almost as dear as from Cardiff and Tyne to Bastia, and the quality of French coal is inferior.

As a steamship agent, most of the coal imported is consigned to me, and until the last few days I have never heard of any serious competition to British coal.

I now hear from British merchants, who are tendering for about 5,000 tons small Cardiff Steam Coal to be delivered to Bastia this year, that they have to face most serious competition from German coal, which they say "is offering at any price," and it is possible that the business may be lost to British tenderers.

BORDEAUX.

Enclosure in dispatch dated Bordeaux, 2nd February, 1904, from Mr. R. D. G. Macdonald, H.B.M.'s. Consul-General at Bordeaux.

1. The estimated consumption of coal in 1903 was:

	Tons.
Bordeaux (including Pauillac and Arcachon)	766,903
Bayonne	280,000
La Rochelle	400,000
Tonnay-Charente	220,000
Total tons	1,666,903

One quarter of the above may be taken as used for domestic, and the remainder for manufacturing or steam purposes, except at Bayonne, where the amount for domestic purposes is reckoned at 40,000 tons, or one-seventh of the whole.

The French Railway Companies and other large concerns almost invariably import small coal of late years, instead of large coal and patent fuel as formerly.

2. The chief source of supply throughout the entire Consular district is the United Kingdom. German coal made its appearance in 1901, the quantity of the latter imported during 1903 being—

	Tons.
Bayonne	65,000
La Rochelle	10,800
Total	75,800

It is estimated that at least 80,000 tons of German coal will be taken at Bayonne during 1904. A few casual cargoes of American Coal and Westphalian coke in 1900 may be left out of consideration.

3. During the last ten years British coal has penetrated inland about 150 miles, and to double that distance in 1900, when the French mines could not cope with the demand during an unusually active industrial period. The facilities for transport are chiefly offered by railways, lighter transport being also available on the Garonne, Dordogne and Charente.

4. Prices per ton during the last ten years for best large Cardiff screened coal discharged into trucks alongside steamers at Bordeaux—

——	Highest.	Lowest.	Average.
	s. d.	s. d.	s. d.
1894	21 3	17 3	18 9
1895	17 9	16 6	17 3
1896	18 0	16 9	17 3
1897	18 3	17 3	17 9
1898	23 0	20 0	21 9
1899	33 0	21 0	24 0
1900	37 0	28 0	31 6
1901	25 6	22 6	24 9
1902	23 0	21 6	21 9
1903	22 0	20 9	21 3

Best Scotch and North Country coal realized, during the same period, from 4s. to 5s. per ton less. French coal ranks in price with the two latter. The few cargoes of American coal were 3s. per ton less than the Cardiff.

The following Table shows the qualities and prices of different coals sold at Bayonne, the chief centre of German competition :—

——	Welsh Small.		North Country Unscreened for Coke and Gas.		Scotch Large.		German washed for Coke.	
	Highest s. d.	Lowest. s. d.	Highest. s. d.	Lowest. s. d.	Highest. s. d.	Lowest. s. d.	Highest. s. d.	Lowest. s. d.
1894			—	—	—	—	—	—
1895	16 0	14 0	—	—	—	—	—	—
1896			—	—	—	—	—	—
1897			—	—	—	—	—	—
1898	19 0	16 0	—	—	18 1½	16 2	—	—
1899	19 0	16 0	—	—	18 10	16 8	—	—
1900	23 0	21 0	30 0	20 0	26 0	22 10	—	—
1901	19 0	16 0	19 0	16 0	18 8	16 11	—	—
1902	18 0	15 0	18 0	15 0	17 0	16 7	13 0	12 0
1903	15 0	13 0	15 0	13 0	15 10	15 4	13 0	12 0

The German coal takes the place of Welsh Smalls and North Country Unscreened. It is not considered as advantageous as British coal, but its employment is determined by its low price. Nearly all the coal imported into Tonnay-Charente is Welsh.

5. All coals shipped at Bordeaux on British vessels are British. The quantities thus furnished in 1903 were : 80,633 tons to vessels under the French Flag and 10,029 tons to other flags, including the British. Only a few thousand tons were shipped as bunkers in other ports, the amount at Bayonne being 1,500 tons and about 300 tons at Tonnay-Charente.

6. Although importations into Bordeaux during 1903 were about 16 per cent. less than during 1902, the falling off was principally caused by the prevailing depression in French industries, which forced the French mines to seek a sale for their products in the direction of imported coal. Statistics show a steady increase in the sale of British coal. In 1883 the importation was about 428,000 tons, which fell back to about 380,000 tons in 1893, 1894, and 1895, a decrease solely due to strikes in South Wales, the Midlands and Scotland. Since 1895, sales have continued to increase. German coal has caused a shrinkage in the importation of North Country coal at Bayonne.

The importation of coke in 1903 amounted to 775 tons only, the chief reason for the smallness of the quantity being that the blast furnaces at Pauillac make coke for this district, using British small coal—half Newcastle and half Cardiff. French mines have of late years perfected their methods of working small coal, and this now makes excellent coke. Coke is made at Bayonne from cheap German coal.

7. Railway rates on coal are about one halfpenny per ton per mile on distances of 100 miles, reduced by about 25 per cent. on a run of from three to four hundred miles. No preferential treatment is accorded to any foreign coal or to French. As elsewhere, special tariffs are allowed to certain French mines in the interior for various industrial points, but foreign coal enjoys similar advantages in other directions.

8. The trade only requires the continuation of favourable prices and freights, together with prosperous industrial conditions throughout France, to maintain its normal progressive character. As shown in answer to Question No. 6, depressed industry in France throws a quantity of unemployed French coal into competition with the British, the French miners being compelled to dispose of theirs at reduced prices. The best opinions in Bordeaux do not consider that the British export duty has any detrimental effect on the sale of British coal, especially of the better qualities ; but Mr. Vice-Consul Schoedelin reports that the management of the Adour Blast Furnaces at Bayonne hold the view that, if the export duty is maintained, coals at seven or eight shillings f.o.b. should not be taxed at the same rate as coals which cost twice as much. These works purchase 140,000 tons per annum and are responsible for the increasing importation of cheap German coal. Mr. Vice-Consul Hamilton at La Rochelle, where German coal has also found a footing, considers that it would be beneficial if the British export duty were made an *ad valorem* one.

9. The exportation of coal from Bordeaux may be considered as 'nil,' only very occasional small lots (generally British patent fuel) being taken as ballast. La Rochelle has a small stationary export of bunker coal and patent fuel for the French Colonies and war ships, amounting to about 25,000 tons annually.

10. The French import taxes only come to a shilling a ton.

BOULOGNE.

Enclosure in dispatch dated Calais, 2nd February, 1904, from Mr. A. C. Payton, H.B.M.'s Consul at Calais.

Report of Mr. H. F. Farmer, Vice-Consul at Boulogne.

1. The average importation for the last ten years is 168,000 tons; the maximum was reached in 1900 with 283,000; in 1903 the quantity was 178,000.

It is in competition with Pas-de-Calais coal, which, in this neighbourhood, has not the advantage of canal transport.

No reliable figures are available as to the quantities used for domestic purposes, but one estimate is two-thirds.

2. Prior to 1894, little else than British coal (mainly Yorkshire) was sold in Boulogne, but as the steam-fishing fleet increased, the Bruay (Pas-de-Calais) mines entered more actively into competition, and this town is now receiving coal from Béthune, Lens, Marles, and Liévin.

The local ironworks alone have imported German coal viâ Holland since 1902. In the last two years they consumed 36,000 tons British, 34,000 German, and 12,000 French.

3. British coal does not, as a rule, penetrate farther than the Somme; beyond that it could not compete with canal-borne coal.

4. Prices of domestic coal (Yorkshire), screened coal, per ton:—

——	s. d.		s. d.	——	s. d.		s. d.
1894	16 0	to	17 8	1899	17 8	to	19 2
1895	14 6	„	17 8	*1900	24 0	„	25 8
1896	12 10	„	14 6	1901	20 0	„	22 6
1897	14 6	„	16 0	1902	18 0	„	20 0
1898	16 0	„	17 8	1903	17 2	„	18 0

5. During the summer a few excursion steamers take small quantities; the steam fishing-fleet uses, almost exclusively, French coal.

6. Decrease, since the exceptionally large importation of 1900, is steady, though the 178,000 tons of last year is well in excess of 1899; reduced activity of local ironworks accounts in a great measure for this decrease.

7. Railway rates, applicable alike to British and French coal, are:—

		fr. c.	
For	1 to 75 kilometres	0·04	per ton per kilometre.
„	76 „ 125 „	0·035	„ ½ „
„	126 „ 200 „	0·020	„ „
„	above 200 „	0·005	„ „

8. As the quality of French coal compares favourably with that from Northumberland and Yorkshire, it is important that the British shipper be careful as to quality sent; all things being equal, the French consumer is likely to show preference for native coal.

Output of Pas-de-Calais mines seems decidedly on the increase; a local newspaper rejoices in the prospect of *eventual* cessation of foreign importation.

9. There are no exports.

10. Town dues (*Octroi*) are identical on British or native coal, but the competitive power of the former is affected by the British shilling export tax, and the French import duty of 1f. 30c. per ton.

BREST.

Enclosure in dispatch dated Brest, 24th March, 1904, from Captain H. Gye, R.N., H.B.M.'s Consul at Brest.

1. This Consular district covers approximately 9,000 square miles, with 871 communes, and a population of about 1,726,000, and is served by two main lines of railway from the interior, viz., the Ouest Line and the Paris-Orléans Line, besides the local light railways. A good deal of British coal is imported a short distance outside this district at the ports of St. Malo on the north, and St. Nazaire on the south, and it is, therefore, practically impossible to determine with any degree of accuracy what quantities may be carried by rail short distances, and consumed in small consignments, within the eastern limits of the Brest Consular district. The quantity imported at the ports within the district, viz., Brest, St. Brieuc, Morlaix, and Lorient, has been as follows for the last ten years:—

1894	- -	100,537 Tons
1895	- -	120,395 „
1896	- -	124,143 „
1897	- -	119,772 „
1898	- -	127,762 „
1899	- -	223,470 „
1900	- -	192,804 „
1901	- -	160,122 „
1902	- -	145,532 „
1903	- -	165,158 „
Total in 10 years		1,479,695

This was all British coal—North County 173,800 tons, and 1,305,895 tons from South Wales. This practically

* High price due to prosperous metal trade, and fact that French mines could not meet the demand.

represents the total consumption in the three departments of Finistère, Morbihan, and Côtes du Nord.

The annual proportion for manufacturing purposes averages from 20 per cent. to 25 per cent. The Brest Gas Works import about 3,400 tons annually, of which about 90 per cent. is North British coal. The Ouest Railway Company consumes about 120,000 tons of coal annually in this district, of which about half is imported at Brest and half at St. Malo in the Cherbourg Consular district, from which port it is carried in their own trucks.

2. South Wales, Glasgow, Sunderland, and other North Eastern British Ports.

3. All over the departments of Finistère, Morbihan, and Côtes du Nord.

Means of Transport:—Main Line Railways and Light Railways and Coasting vessels. Also the Brest-Nantes canal, but little coal is carried by the latter.

4. No such traffic. All the coal goes from and not to the quays.

5. The local steamers and coasting vessels consume about 11,000 tons at Brest annually, of which about 4,000 tons are shipped at Dunkerque and the remainder comes from South Wales. Occasionally homeward bound steamers call in to complete bunker coal, but only take small quantities as a rule. In the last two years four British vessels have called for coal, taking altogether from 250 to 300 tons.

6. The above figures (Reply No. 1) will show the fluctuation in the annual amount of British coal imported. There was a diminution during the South African War on account of the increased price and the British export duty, There is, however, every appearance of a considerable increase. From 1st January to 15th March this year the amount of coal imported by British vessels to Brest has been 22,471 tons, as compared with 6,653 tons for the corresponding period of last year.

This may in some measure be caused by the strikes and increased price of coal in the collieries in the North of France, though very little French coal finds its way here, on account of the cost of transit, and also the superiority of British coal.

There is very little coke imported, but what there is comes from England; in 1902, there were fifty-four tons; in 1903, eighty tons at Brest.

7. The railway rates for coal of all kinds are the same by agreement between the railway companies, under the Kilometric Rate Law of 1892, and there are no preferential rates. The rates by "Petite Vitesse" is fifty-five centimes per ton per kilometre or about ninepence per ton per English mile.

8. The British coal trade is, I think, sure to be maintained and, as shown above, is on the increase. It must vary with price and the general conditions of trade, but it has the advantage of a short distance in transit, and consequently lower rate of transport than foreign coal. This applies especially to Welsh coal. Practically all the coal consumed in this district is British, and the attempts to establish a trade with Germany have so far failed on account of the cost of transit.

9 There is no export of coal or coke from this district.

10. The whole position of the coal trade here is at present, I think, very satisfactory, considering that there are scarcely any factories in this part of the country. With a view to increasing it I can only suggest once more what I have done several times with regard to British trade in general, that all trade circulars should be printed in French, and money values, weights, and measures given according to the decimal system and the metric system used in this country, as few people understand our complicated British systems.

CALAIS.

Enclosure in dispatch, dated Calais, 2nd February, 1904, *from Mr. C. A. Payton, H.B.M.'s Consul at Calais.*

1. 120,000 tons.

	Tons.
Domestic purposes	80,000
Manufacturing	30,000
Steam	10,000

2. 1. Mines of the Department of the Pas-de-Calais.
2. Yorkshire.
3. Tyne ports.
4. Scotland.
5. S. Wales.

1894—1, 2, 3, 4.
1895—1, 2, 3, 4.
1896—1, 2, 3, 4.
1897—1, 2, 3, 4, 5.
1898—1, 2, 3, 4.
1899—1, 2, 3, 4.
1900—1, 2, 3, 4.
1901—1, 2, 3, 4.
1902—1, 2, 3, 4, 5.
1903—1, 2, 3, 4, 5.

Importation of one firm, Yorkshire coals.

	Tons.	
1894—No return available.		All for domestic purposes.
1895—15,033.		
1896—14,903.		
1897—11,492.		
1898—12,514.		
1899—11,573.		
1900—14,172.		
1901—10,120.		
1902—11,515 (1 month's strike in N. France.)		
1903—7,261.		

Importation of British coal, 1896 *to* 1902.

	Tons.
1896	37,723.
1897	33,271.
1898	43,091.
1899	29,305.
1900	112,060.
1901	70,029.
1902	74,345.

Coal Production, Collieries of the Pas-de-Calais and Nord, same period.

	Tons.
1896	17,100,222.
1897	18,942,196.
1898	19,954,160.
1899	20,540,872.
1900	20,870,530.
1901	20,353,507.
*1902	18,986,931.
†1903	22,938,100.

3. In immediate neighbourhood about ten miles.

To Paris for Gas Company; also over system of Northern Railway of France in shape of patent fuel (briquettes).

The Paris Gas Company has had a fluctuating importation through Calais. Some years ago an English steamer used to trade exclusively for this Company.

One firm had a contract, and brought in about 10,000 tons per annum. It is suggested that this now goes through some other port, possibly Rouen.

During the strike in the Northern French Colliery District (Pas-de-Calais and Nord Departments), 1902-3, the Northern Railway largely imported British coal, which was distributed over their lines.

They appear now to import only Welsh small coal, used in making patent fuel, principally used on their locomotives.

Facilities for transportation, good; railways and canals.

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* Strike at beginning of year.
† Approximate; exact figures not yet available.

4. "Through and through" coal, delivered in trucks alongside vessels, during the ten years 1894–1903.

Year.	Pas-de-Calais (Bruay).		Scotch.		Yorkshire.		Remarks.
	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	
1894	18 0	16 0	—	—	20 0	14 9	
1895	15 2	12 6	—	—	15 7	12 5	
1896	15 2	12 0	—	—	15 2	13 8	
1897	15 2	12 0	—	—	15 2	14 6	
1898	15 2	12 6	—	—	16 10	14 6	
1899	16 10	15 6	—	—	19 2	17 8	
* 1900	25 0	21 0	—	—	26 6	20 10	
1901	23 6	20 6	14 10	14 10	25 0	18 10	
† 1902	23 0	17 6	15 9	15 9	22 6	16 4	
1903	20 6	17 6	15 9	15 9	19 2	16 10	

Small coal would be about 1s. 8d. per ton less, screened coal about 2s. higher.
Firm importing Scotch coal give only one yearly price.
Prices of Welsh and Tyne coals cannot be accurately ascertained.

Present retail prices of Bruay (Pas-de-Calais) Coals.

	£ s. d.		£ s. d.
Small	0 17 6	Large screened	1 9 8
Rough small	1 0 0	Anthracite	2 3 4
Through and through	1 5 0	Smith's coal	1 15 0
„ „ without dust	1 6 6	Patent Fuel	1 8 10
Screened	1 8 0		

All less 10d. per ton for payment on delivery.

Present price of Yorkshire coal, for domestic purposes, delivered in town.

	£ s. d.
Through and through	1 4 0
Small	1 0 0

5. Very small; about 1,500 tons to British steamers in 1903.

Average of last five years, coal shipped for bunkers, nearly all French, 22,777 tons.

It is important to note that the Northern Railway Company make a reduction of 40 per cent. on their ordinary rate of transport when the coal is for exportation.

6. Importation of British coal has fallen off, except during times of local strikes; this applies to the principal kinds imported, Scotch, Yorkshire, and Tyne, there being but little, and chiefly small coal, from Wales. This is attributable to increased production in the Pas-de-Calais district, and to the greater care (according to a French merchant) taken in production and delivery, coals being washed and hand-picked before being sent away from the colliery. A guarantee is also given, which is binding and enforced, as to the proportion of volatile matter and ash.

According to an English importing firm, house coals are particularly affected, as, in spite of lower sea freights, they cannot purchase house coal at a price which can compete with that of French coal from Bruay and Marles.

7. Railway rates, locally, about 1s. 6d. per ton for a distance of ten or twelve miles, say to the ironworks at Marquise, about half-way between Calais and Boulogne.

On the Northern Railway generally, 5 centimes, say a halfpenny per ton per kilometre (1,094 yards), but gradually reducing for longer distances, and reported to grant 40 per cent. reduction when coals are for exportation. Formerly the rate for French coal, from the mines to Calais, varied according to the number of wagons taken; now the lowest rate is applicable to single trucks.

No differential rates for British coals.

8. A French merchant suggests greater care for cleaning and screening, and giving guarantees of proportion of volatile matters and ashes.

But English importers say, with more pertinence (though the above suggestion certainly has its importance), that the trade can only be maintained if they are enabled to bring a better class of coals to sell at the price they are now obliged to ask for an inferior quality. They state that, even for second quality, present prices are not remunerative; it will take them a long time to recover lost ground, and, as an important aid to this, they suggest taking off the English export duty of a shilling a ton.

9. No exportation, except in the form of bunker coals.

Coke is locally produced at the gas-works, and locally consumed.

Patent fuel made at various places in the interior, and largely used on the railway.

10. The present French import duty of 1 fr. 30 centimes, a fraction over a shilling per ton, added to the English shilling export duty, handicaps British coals to the extent of a little over two shillings, taking the pound sterling at par, 25 francs to the £.

But, of course, the most important factor against the increase of British coal trade in this district is the proximity of large French coalfields.

* Year of large importation, and French strikes.
† Strike in Autumn.

CHERBOURG.

Enclosure in dispatch dated Cherbourg, 26th February, 1904, from Mr. Montague E. Loftus, H.B.M.'s Consul at Cherbourg.

1. The present amount of coal consumed or imported through this port into France is 301,759 tons, as nearly as can be accurately ascertained.

Practically all this coal is of the hard steam coal variety, only a very small portion of it being used for domestic purposes.

2. Great Britain has supplied all the coal imported, which is brought exclusively from British Ports in Wales and England, and carried in British vessels.

3. There being so small a supply of coal in France, I may say that such coal as is not used in the immediate district is sent inland to various inland towns, and to all parts of the interior of France, the carrying trade being done on land from Cherbourg by the Western Railway of France (*chemin de fer de l'Ouest*).

4. Respecting prices during the last ten years, these are most difficult to fix accurately at any certain figure, merchants and dealers being willing to cut their prices accordingly as the amount of coal bought or sold was large or small; contract prices would be lower than current prices to small dealers or buyers.

As far as I can state, I find that the average price of good Welsh coal from 1894 to 1903 has been between 23s. 6d. per ton to 27s. 6d. per ton, the ton being a French ton. In 1898 the price was very much higher, rising to about £2 per ton, as also in 1900. In 1903 and 1902 the price seems to have generally been about 26s. per ton.

Scotch coal averaged about 16s. 6d. per ton from 1894 to 1897, after which the prices rose, and for the following three years Scotch coal sold at 23s. to 24s. per ton, falling in price again in 1901 to 18s. 9d. to 19s. 4d. per ton. In 1902 and 1903 prices ruling have been from 17s. 6d. to 17s. 9d. per ton.

5. No coal is re-exported again from this district, such vessels as come here being almost all sailing ships; the few steamers which call as a general rule run over from some port in the United Kingdom, and carry enough coal in their bunkers for their return journey.

6. The quantity of coal imported into this Consular district during the past ten years has increased yearly, and the trade is well maintained and prosperous.

7. The rates charged for coal transport are very varied, but the railway authorities have given me the following prices as an example—

Distance.	Cost.
Up to 25 kilometres - - -	8 cts. per kilometre per ton.
From 101 to 300 kilometres	4 cts. per kilometre per ton.
„ 601 to 800 „	25 cts. per kilometre per ton.
In ten ton wagons—	
From 1 to 25 kilometres	1 fc. 75 cts.
„ 26 to 45 „	2 fcs. 75 cts.
„ 46 to 105 „	5 fcs. 15 cts.
„ 106 to 200 „	8 fcs. 00 cts.

Special rates per ten wagon to Carentan, 2 fcs. 25 cts.
„ „ „ „ La Meauffe, 3 fcs. 00 cts.

8. The coal supply of France being so limited internally, this import trade with Great Britain is well maintained always and needs little pushing, coal being so necessary for the various factories and railway companies.

In the French households throughout the country, and even very generally in towns, wood is burnt still, little coal being used for the household; this fact accounts for the larger quantity of the coal imported being steam coal.

There are a great number of coal agents established in Cherbourg, and generally in the district throughout, all being French agents, of course.

9. No coal or coke is exported from Cherbourg or this district.

10. The total charge on coal imported into this Port is 1s. per ton as nearly as can be put into English currency, this charge including the local port tax of 1d. per ton duty.

The facilities for unloading the cargoes are fairly good, and labour is cheap and plentiful as a general rule.

CORSICA. *See* AJACCIO AND BASTIA.

DAKAR (SENEGAL).

Enclosure in dispatch dated Dakar, 29th January, 1904, from Mr. H. G. Mackie, H. B. M.'s Vice-Consul at Dakar.

1. In the absence of statistics for the year 1903 the consumption of coal is estimated as follows:—

	Tons.
Bunker Coal - - - - -	35,000
Consumed by Workshops, etc. -	3,000
Imported for Domestic purposes	2,000
	40,000

2. The coal supplies of recent years have been drawn almost exclusively from the United Kingdom, but as coal does not appear in the annual Customs returns as an item of import, statistics covering a period of ten years are at present unavailable. According to information obtained from the Custom House the following quantities of coal were discharged at this port during the years 1898–1902:—

—	From Great Britain.	From France.	Total.
	Tons.	*Tons.*	*Tons.*
1898	35,760	53	35,813
1899	36,266	30	36,296
1900	31,458	82	31,540
1901	27,987	3	27,990
1902	15,611	730	16,341

Notwithstanding that the above statistics are official, they must be read with caution, a discrepancy having occurred between these figures and the data obtained from other sources. Colliers often discharge their cargoes into hulks and even direct into the bunkers of vessels requiring fuel, so that considerable quantities of coal are not landed at Dakar and may possibly have escaped Customs control.

The following figures represent the imports of the Messageries Maritimes and the Coaling Company of coal from the United Kingdom :—

During the year ended June 30th.	Messageries Maritimes.	Coaling Company.	Total.
	Tons.	*Tons.*	*Tons.*
1900	21,595	35,510	57,105
1901	16,568	19,275	35,843
1902	19,149 (*)	23,797	42,946
1903	9,268	16,994	26,262
Latter Six Months of 1903 - -	18,211		

3. It is considered improbable that coal should have penetrated far inland, though small quantities may have reached Kayes by means of the Dakar-St. Louis railway and Senegal river.

Briquettes being the fuel consumed by the railway and river steamers, our manufacturers should not lose sight of the fact that the growth of this trade must necessarily progress with the development of traffic on the Sudan and other railways in course of construction in this Protectorate. As regards inland consumption, the preference given to patent fuel makes it apparent that coal will remain an unimportant factor in the import lists of this Colony for some time to come.

4. Prices :—

Highest - -	37s. 7d. in 1901.
Lowest - -	25s. 7d. in 1899.
Contract price	27s. 6d. in 1903, free on board.

5. Dakar being a coaling station, the bulk of the coal imported is re-shipped for the bunkers of vessels visiting this port. Only seven British vessels coaled here in 1903, taking 1,195 tons of coal. In previous years the number of these vessels was even smaller than in 1903.

6. From the figures given above it is apparent that a steady falling off has occurred in the coal trade of this port. This decline may be partly attributed to the outbreak of yellow fever in 1899–1900, a period passed in the midst of keen crisis occasioned by the flight of the European population, and partly to the unsuccessful operations of the former coaling company. Trade is, however, reviving and there are no reasons for anticipating any further decrease in the imports of coal. The coal imported is principally Ocean Merthyr steam coal.

7. The railway charges for transporting coal to St. Louis amount to 16 francs per ton. No differential rates exist.

(*) 7,836 tons were also imported from America. (Not included in these figures.)

8. British coal does not at present encounter any competition in this market. The suggestion I would venture to offer on the subject of this query is that care should be taken to maintain a sufficient stock to meet any sudden demand for fuel, such as might be occasioned by the visit of a French squadron to these waters, and that the company's coaling capacity be increased as much as possible. Orders were lost a few days ago owing to inability to place alongside the shipping of the port the quantities of fuel requisitioned, which unexpectedly exceeded the usual demand.

9. *Vide* answer to No. 5.

10. The bulk of the coal imported is destined for the bunkers of vessels calling at this port, and therefore pays no duty. The duty on coal entering the Colony is 3 francs 60 centimes per ton, in addition to the Octroi duty of 50 francs.

Supplementary Notes :—

The impetus given to harbour and other works by the grant to the Colony of a loan of 65,000,000 francs (£2,600,000) by the French Government will, it is believed, have a beneficial bearing upon the trade of Dakar, which bids fair to become a coaling station of some importance. The trans-Atlantic liners of the Messageries Maritimes call here for coal, of which, it is estimated, they consume upwards of 20,000 tons per annum. This company owns sheds and yards capable of storing 30,000 tons.

An English firm who established themselves here in February last under the firm of "*Compagnie Française des Charbonnages*," have secured certain privileges granted to the former coaling company. According to the terms of the concession the company enjoy the exclusive right to sell coal to steamers, with the sole exception of those owned by the Messageries Maritimes. They have also obtained a grant of land adjoining the port for the construction of sheds, a wharf and jetty. On completion of these works the company will have accommodation for upwards of 16,000 tons. The company have also recently concluded contracts for the supply of coal to the Naval Department here, and to the Woermann and other lines of steamers. Unhampered by competition and favoured with the advantages of a geographical position that places the depôt within easy reach of some of the large ocean lines, there is every hope of an expansion of trade in the near future.

The following Table, supplied by the Custom House, shows the imports of briquettes during the years 1898–1902 :—

—	Total Quantity Imported.	Imported from Great Britain.
	Tons.	*Tons.*
1898	5,838	667
1899	4,991	1,786
1900	2,708	2
1901	9,772	2,953
1902	6,218	962 (*)

(*) These figures do not agree with those supplied by the Coaling Company, who claim to have imported 2,700 tons from Great Britain in 1902 ; their imports in 1903 amounted to 5,540 tons.

DUNKIRK.

Enclosure in dispatch dated Dunkirk, 26th January, 1904, from Mr. Edward Taylor H. B. M.'s Consul at Dunkirk.

1. In the year 1903—

Domestic purposes - - - - - - - -	35,000 tons.
Industrial ,, - - - - - - - -	25,000 ,,
Bunkering ,, - - - - - - - -	66,000 ,,

The above figures of coal shipped for bunkering purposes show a large increase over former years, being 26,000 tons over those for 1902 and 1901.

2. Mines in the North of France, and British North Country, Scotch and Yorkshire coal, and a small quantity from Cardiff. Some years ago several cargoes of small coal came from Cardiff, and were sent into the interior to make briquettes.

Imports of British Coal.

Year.	For Paris Gas Co.	Other Coal.	Total.	Year.	For Paris Gas Co.	Other Coal.	Total.
	Tons.	Tons.	Tons.		Tons.	Tons.	Tons.
1894	Figures not obtainable.	—	95,566	1899	61,500	19,508	81,008
1895	do.	—	70,898	1900	80,730	150,551	231,281
1896	50,619	9,507	60,126	1901	43,000	91,307	134,307
1897	57,000	3,081	60,081	1902	21,234	54,068	75,302
1898	62,998	12,595	75,593	1903	39,000	11,127	50,127

Only British coal is imported, and it comes chiefly from the North of England.

3. Coal has been sent to the Paris Gas Company for many years, and some has been sent to Rheims, Lille, and other places in the North, and in the case of strikes to many places in the North of France.

Facilities.—Railway and Canals.

4. The following prices have been furnished by a leading coal merchant:—

Year.	Cardiff.				North Country.			
	Maximum.		Minimum.		Maximum.		Minimum.	
	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.
1894	21·	16 8	20·40	16 2	16·	12 8½	15·40	12 2½
1895	21·	16 8	20·40	16 2	16·	12 8½	15·40	12 2½
1896	21·30	16 11	20·70	16 5	16·60	13 2	16·	12 8½
1897	21·90	17 4½	21·30	16 11	16·90	13 5	16·30	12 11
1898	24·75	19 8	24·45	19 5	19·60	15 6½	19·	15 1
1899	26·	20 7½	24·70	19 7	21·	16 8	19·90	15 9½
1900	36·60	29 0½	36·60	29 0½	31·60	25 1	31·	24 7
1901	28·50	22 7½	28·20	22 4½	23·	18 3	22·70	18 0
1902	26·65	21 1½	26·05	20 8	21·	16 8	21·	16 8
1903	26·	20 7½	25·40	20 2	20·	15 10½	20·	15 10½

No other kinds of coals sold under similar circumstances at this port.

The price of French coal delivered as described below was as follows :—

Years.	Household purposes. Octroi and cartage included.												Industrial purposes f.o.b. lighter alongside works.				Steamers f.o.b. in bunkers.	
	Large Coal.				Through and through.				Inferior Quality.				Through and through. 30/35% large.					
	Maximum.		Minimum.		Maximum.		Minimum.		Maximum.		Minimum.		Maximum.		Minimum.		Max.	Min.
	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	Fcs.	s. d.	s. d.	s. d.
1894	26	20 7½	25	19 10	24	19 0½	23	18 3	22	17 5½	21	16 8	12·50	9 11	12	9 6½	13 0	12 6
1895	26	20 7½	25	19 10	24	19 0½	23	18 3	22	17 5½	21	16 8	12·50	9 11	12	9 6½	13 0	12 6
1896	26	20 7½	25	19 10	24	19 0½	23	18 3	22	17 5½	21	16 8	12·50	9 11	12	9 6½	13 0	12 3
1897	25	19 10	24	19 0½	23	18 3	22	17 5½	21	16 8	20	15 10½	11·50	9 1½	11	8 9	12 6	12 0
1898	27	21 5	26	20 7½	25	19 10	24	19 0½	23	18 3	22	17 5½	13·50	10 8½	13	10 4	14 0	13 6
1899	30	23 10	29	23 0½	28	22 3	27	21 5	26	20 7½	25	19 10	16·50	13 1	15	11 11	16 6	16 0
1900	32	25 5	31	24 7	30	23 10	29	23 0½	28	22 3	27	21 5	18·50	14 8	18	14 3½	18 0	17 6
1901	35	27 9	33	26 2½	33	26 2½	31	24 7	31	24 7	29	23 0½	21·	16 8	20	15 10½	21 0	20 0
1902	31	24 7	30	23 10	29	23 0½	28	22 3	27	21 5	26	20 7½	17·	13 6	16	12 8½	16 6	16 0
1903	30	23 10	28	22 3	28	22 3	26	20 7½	26	20 7½	24	19 0½	16·50	13 1	15·50	12 3½	16 3	15 9

5. No British coal used for bunkering.

6. From 1894 to 1899 the average import was about 75,000 tons.

In 1900, owing to unusual activity in the metal trades and stocks being low, there was an exceptional demand for coal, and the imports rose to 231,000 tons, although at the same time there was no decrease in the output of the mines in this department (Nord).

In 1901, trade being less active, imports fell to 134,000 tons, which was still considerably more than the average, probably owing to depressed trade, coupled with mild winters; the imports of 1902 fell to the average figures of 1894–1899, and those of 1903 fell away still more, owing to the same reasons, coupled with an increased output from the mines in the North of France.

Coal merchants say there is a disinclination to use British coal. This disinclination is, I consider, probably owing to British coal of indifferent quality having been imported, especially at the time of the strikes, and sold at a high price by the retail coal merchants.

A leading spinner states that during the strikes some years ago, he tried some Yorkshire coal, but would not repeat the trial, for, as he stated, "It went too fast up the chimney." It is reported that 3,000 tons of coal from South Wales for the interior have been contracted for, of which 600 tons have just been delivered (January).

7. Railway rates per ton, per truck load of 10 tons.

	Not exceeding	75 km.,	4	cm.	per ton	per km.
from 76 to	„	„ 125 „	3½	„	„	„
„ 126 to	„	„ 200 „	2	„	„	„
	above 200 km.,		½	„	„	„

plus 40 centimes per ton station expenses.

Example.—Paris 267 kilometres.

75 km. @ 4 cm.	- - Fcs.	3·
50 km. @ 3½ cm.	- - „	1·75
75 km. @ 2 cm.	- - „	1·50
67 km. @ ½ cm.	- - „	·35
Station expenses	- „	·40
267 km.	Fcs.	7·

say 166 miles @ 5s. 6¾d. per ton.

No differential rates on native or other foreign coal from Dunkirk to interior.

No native coal is sent inland from Dunkirk.

8. No.

The following is the opinion of the leading firm of forwarding agents, through whom a great part of the imported coal was forwarded into the interior:—

"It would appear that there is no great interest "for British coal exporters to endeavour in spite of "everything to develop coal business through "Dunkirk, at all events in ordinary times, strikes "excluded.

"Dunkirk is too near the North French coalfields, "and British coal would have a far better field in "the districts served by the French ports between "Rouen and Bayonne, in which districts it can "compete on more favourable terms with French "coal than at Dunkirk."

9. Since 1894, when the exports to French Colonies amounted to some 20,000 tons, the exports to these colonies have decreased, until in 1902 only some 8,000 tons were exported thither. In the three years, 1894, 1895, and 1896, the exports to Russia amounted to 65,000 tons, since which time there has been only an annual export of about 3,000 tons to foreign countries. In 1902, 2,500 tons of Patent Fuel were exported to the French Colonies and 500 tons to the Dutch Indies.

The supply of bunkers to steamers in 1894 was 16,000 tons, and increased in 1898 to 60,000 tons, subsequently decreasing to 40,000 tons in 1902 and rising to 66,000 tons in 1903.

One thousand tons of German coke is now arriving in railway trucks to be loaded in a Russian sailing vessel for San Francisco.

10.

Customs duties	- -	Fc. 1·20 cs.	per ton.
Statistical dues	- -	10 „	„
Chamber of Commerce Tax (Péage imposed January 1st, 1904)	- - -	2 „	„
		Fc. 1·32 „	„

or 1s. 0½d.

HAVRE.

Enclosure in dispatch dated Havre, 3rd March, 1904, from Mr. Walter R. Hearn, H. B. M.'s Consul-General at Havre.

1. There is imported to Havre for the various lines of steamships annually about 150,000 tons of Cardiff or Welsh steam coal. The Western Railway Co. imports about 80,000 tons composed of about two-thirds Welsh steam coal and one third North country coal. The quantity imported for manufacturing and domestic purposes is about 400,000 tons per annum of all kinds. The local Gas Company imports about 60,000 tons.

2. Practically nothing but British coal has been utilised at Havre during the last ten years. In 1900 and 1901, several cargoes of American coal for steam purposes were imported but did not give satisfaction, and two cargoes were re-exported to America in British vessels. There have been several cargoes of German coal imported amounting in 1903 to 28,000 tons, the greater part of it being taken by the Western Railway in fulfilment of a contract. The competition of German with British coal does not at present appear to be serious, but it might easily become so.

3. British coal from Havre penetrates by rail only as far as Yvetot, about 30 miles off. The coal for the interior and Paris is imported viâ Rouen.

4. This is a very difficult question to answer. As coal does not penetrate far inland through Havre, prices are not calculated free on truck. Prices have followed the fluctuations of the English market during the last ten years. The small importation of coal from the United States and Germany did not affect the prices of British coals at Havre.

5. The quantity of British coal shipped to bunkers of British vessels is exceedingly small, probably not more than 10,000 tons. The bunkering of British steamers in Havre has diminished during the last ten years, shipowners finding it more economical to proceed, after discharge of cargo, to an English coaling port.

6. There is naturally a fluctuation in the annual imports of coal; but the imports to Havre have not fallen off during the last ten years, although there appears to be a small decrease annually since 1900. No foreign coal imports compensate for this, and the decrease is probably due to increased importations to Rouen for Paris and inland supplies.

7. The railway rates charged on British coal are the same as on any other coal. French coal can be brought from the North of France at a privileged rate, but their prices have been such that little or no competition has been experienced in this district from that quarter. The freight on coal from Havre to Yvetot is 2s. 6d. per ton.

8. The German competition, if competition it can be called—28,000 tons out of 664,000 tons in 1903—attacks mainly the Welsh small coal, the Germans being able to deliver a small through coal at, or a little under, the cost of Welsh small, paying the shilling export tax.

9. There are no exports of coal or coke from Havre; but a certain amount of patent fuel made from English small coal is exported to the French West Indian Colonies. These exports have not varied.

10. A British subject here, interested in coal and perhaps the most competent person to give an opinion on the subject, informs me that although it is certain that the shilling export duty in no way affects the large coals or the better composed through coals, it does enable foreign competition to contend with English small coal. Buyers on this side have, since the introduction of the tax, almost invariably had to pay the shilling to the English exporter, thus enabling German coal, for instance, to compete for business where British coal was formerly alone used.

Note. The German coal comes from the Syndicat Rhenan Westfalien at Essen on Ruhr, and the prices quoted to me, compared with Cardiff coals of approximately similar quality, are at the present time f.o.b. steamer at Havre; German coals 18s. and Cardiff coals sixpence more. At the same time, a large factory here is buying, at the present moment, German coals of the same quality as those mentioned above, from merchants in Havre at 14s. 7d. the ton; whereas they pay for about the same quality of Cardiff coal, which they are in the habit of using, 15s. 8d. per ton. The steam generating power of this German coal is 7·5 and of the Cardiff coal 7·7.

A very interesting map is published by the American Coal and Shipping Agency of 2, Square de l'Opéra, Paris, showing the consumption of the different kinds of coal in each Department of France and the parts of France where foreign coal is principally used.

German Coal in France.

Note. "A short Report on the Importation of German coal into France, to which are annexed some interesting figures supplied by the Director of Customs at Paris to a person here interested in the subject, who very kindly allowed me to make use of them." (*Extract from Mr. Consul-General Walter R. Hearn's despatch, dated Havre, 16th April,* 1904.)

I have been so fortunate as to obtain two series of official figures, showing the importation of Coal, Coke and Patent Fuel from Germany and Holland by sea and land to the various French ports and towns in 1902, and during the first ten months of 1903. The coal which comes by sea is all the produce of the Syndicat Rhenan Westfalien at Essen on Ruhr, sent down the Rhine in lighters to Rotterdam, and shipped from there to France, and it is this German coal which is making such headway in this country. I am informed that this coal is not equal in quality to the same grades of Cardiff coal and that, to make it marketable, it has to go through a great deal of washing and screening before it is shipped down the Rhine. The Germans, however, are determined to make a market and to sell it, and will give any guarantees and concessions demanded of them, rather than not sell the coal. The chief Manager of the Syndicate in Paris is, I believe, an Englishman who is working the business most energetically. He only appoints one agent in each town, so as to create a sort of monopoly for Westphalian coal and every attention is given to the wishes and requirements of buyers, a mode of doing business to which I am sorry to learn British sellers do not pay enough attention. This monopoly prevents agents competing among themselves and gives the sole agent a greater incentive to push German coal in his own district, in preference to other coal, as well as to give all his attention to that one branch of the coal trade.

I am told that the imposition of the English Coal Tax enables German coal to be sold at about a shilling cheaper than Cardiff coal of slightly lower grade, and I am also told that even sentiment has exerted an influence among French buyers, and that many, looking upon the tax as a war tax, refuse to use English coal, as they object to pay towards the expenses of a war which did not concern them, and in which they had no hand. I cannot vouch for the exactitude of this statement, but I give it for what it is worth as told me by a Frenchman who is greatly interested in the sale of British coal. As contracts are made, it is stipulated that the tax shall be paid by the buyer, and this may move buyers to enter the German market rather than be saddled with a tax which may, at the beginning of any financial year, be remitted or increased and so upset their calculations. It appears that the Coal Tax favours the competition of German coal in that it hits the lower grades of coal harder than the better kinds; a steam coal worth twenty shillings being able to bear a 5 per cent. tax far easier than a coal worth only eleven shillings can bear a tax of over 9 per cent. It is only with these lower grades of coal that the Germans are able to compete, as they apparently do not produce any high grade coals. That they do compete occasionally in a high degree is evidenced by the fact that the Compagnie Parisienne de Gaz, after having made a trial of the Westphalian Syndicate's coals, gave an order for 40,000 tons and was so satisfied with them, that it entered into a contract for the supply of 250,000 tons, the delivery of which began in July of last year, and is to continue until the Gas Company's contract with the City of Paris expires in 1906.

Up to the present time, small quantities of German coals had reached Paris by way of the canals; but it is now contemplated to bring them in huge German lighters, which will be towed from Rotterdam to Havre by sea and will then go by the Canal de Tancarville and the Seine to Paris.

Nevertheless the prices of British coal continue to rise, and the total amount of coal exported continues to increase. The only persons who appear to suffer are the shipowners and the consumers. The former carries the coals for freights which were never lower, and it is a puzzle to know how any profit can remain after charges, discounts and percentages are paid. The latest rates quoted are three shillings and sevenpence halfpenny per ton from the Tyne or Cardiff to Havre, and this is fivepence halfpenny less than the Havre Municipality charge the consumer for the privilege of burning a ton of coal in the city, on which he has already paid one shilling English tax and another shilling French Government tax, that is to say six shillings in taxes on a ton of coal worth not much more than double the amount. During the three last years, however, the exportation of coal from the United Kingdom to France has decreased sensibly, while the importation of German coal to France has sensibly increased, notwithstanding that the total importations have been on the decrease. Taking the coal imported "from other countries" as German coal shipped from Rotterdam and the Rhine, we get the following figures, under "Commerce Général," that is, Gross Imports for the last three years, showing that, while British coal has fallen off by 749,554 tons, the imports from Germany have increased by 922,053 tons.

——	UNITED KINGDOM.			GERMANY.		
——	1903.	1902.	1901.	1903.	1902.	1901.
Coal	7,139,240	7,558,770	7,959,764	1,448,320	1,130,753	791,762
Coke	24,050	32,961	47,960	963,370	673,337	782,975
Briquettes	94,880	113,786	—	85,100	15,785	—
Total	7,258,170	7,705,517	8,007,724	2,496,790	1,819,875	1,574,737

Total importation into France—

1903.	1902.	1901.
14,771,130.	14,986,083.	15,206,477

The figures given in the annexed Tables are a striking proof of the advance German coal made in France in 1903.

The amount imported from Rotterdam of all kinds in 1902 was only 103,045 tons, whereas in the first ten months of 1903 it amounted to 351,000 tons—more than three times the quantity. Taking the coal of all kinds imported direct from Germany by sea and land, that imported in 1902 was 1,718,196 tons, and nearly as much, viz., 1,683,860 tons, was imported in the first ten months of 1903. Taking the complete years, the total importations of all kinds for consumption in France were as follows—

	United Kingdom.	Germany (Direct.)
1901.	7,063,437.	1,564,940.
1902.	7,418,311.	1,718,222.
1903.	6,789,340.	2,065,050.

To this must be added the importations from Rotterdam which are included under the heading of "from other countries," but it is certain that they must make up the greater portion of these items, as the United Kingdom (except coke), Belgium, Germany direct, and the United States, are given separately in the Customs' Returns.

The items from "other countries" were—

——	1901.	1902.	1903.
Coal (Tons) - -	7,068	88,563	331,530
Coke „ - -	45,911	33,646	22,300
Coke imported from the United Kingdom included—			
Briquettes - -	—	129	53,330
Total- - -	52,979	122,338	407,160

The amount of all kinds shipped from Rotterdam by sea in the first ten months of 1903 was 343,750 tons.

The following list of French ports which imported German coal by sea for home consumption will show at a glance how it is working its way into even the smallest ports, and is no longer a negligible quantity, but promises to become a formidable rival to British coal in the future, should the trade increase in the same proportion as in the last two years. The figures which follow include coal, coke and briquettes, and the amount taken by each port of each kind will be seen on reference to the two general Tables.

——	Whole Year (1902.)	Ten months (1903.)	Increase 1903.	——	Whole Year (1902.)	Ten months (1903.)	Increase 1903.
Bastia - - - -	—	570	570	Honfleur - - -	—	2,490	2,490
Bayonne - - - -	35,043	43,570	8,527	La Rochelle - - -	2,611	3,290	679
Bordeaux - - -	20,951	16,260	—	Marseille - - -	8,546	66,120	57,574
Boulogne - - -	7,370	5,460	—	Morlaix - - -	—	20	20
Brest - - - -	—	130	130	Nantes - - - -	2,621	30,460	27,839
Caen - - - - -	8,614	32,590	23,976	Nice - - - - -	—	2,210	2,210
Cherbourg - - -	—	70	70	Rouen - - - -	10,830	73,880	63,050
Dieppe - - - -	1,108	19,810	18,702	St. Nazaire- - -	54,282	86,350	32,068
Granville - - -	2,311	4,170	1,859	St. Malo - - -	—	10,280	10,280
Havre - - - -	5,354	25,200	19,846	Sables d'Olonne -	—	2,990	2,990

The total quantities of all kinds imported from Germany direct by sea and from Rotterdam in 1902 were 165,099, whereas in the first ten months of 1903, they had increased to 425,960 tons. I leave the quantities imported by land out of the question, as they are more or less normal, the French towns on or near the German frontier being the natural markets for those coals and British coals penetrating only in limited quantities.

It is, however, noteworthy that the amount imported from Holland by land, which was only 4,927 tons in 1902, increased, during the first ten months of 1903, to 7,350 tons, and it is understood that these were German coals.

The figures given are those of the "Commerce Spécial," or coal actually imported for local consumption and not, except in one instance, the gross quantity imported or "Commerce Général." The quantities are all given in metric tons of a thousand kilogrammes.

Amount of Coal imported from and through the Netherlands in 1902 *and the first ten months of* 1903.

This coal imported both by land and sea is German coal, shipped down the Rhine to Rotterdam

Kind.	Destination.	1902. By Sea.	1902. By Land.	1902. Total.
		Tons.	Tons.	Tons.
Coal	Bordeaux	5,936	—	5,936
	Boulogne	7,370	—	7,370
	Givet	—	1,863	1,863
	Jeumont	—	1,530	1,530
	Le Havre	5,354	—	5,354
	Lille	—	807	807
	Marseille	6,699	—	6,699
	Nantes	2,621	—	2,621
	Rouen	10,830	—	10,830
	St. Nazaire	31,830	—	31,830
	Longwy	—	717	717
	Caen	8,614	—	8,614
	Valenciennes	—	10	10
	Total	79,254	4,927	84,181
Coke	Bordeaux	11,513	—	11,513
	Marseille	1,819	—	1,819
	St. Nazaire	5,403	—	5,403
	Total	18,735	—	18,735
Briquettes	Bordeaux	101	—	101
	Marseille	28	—	28
	Total	129	—	129
	Grand Total, 1902	98,118	4,927	103,045

Kind.	Destination	Ten months of 1903.		Ten months of 1903. Total.
		By Sea.	By Land.	
		Tons.	Tons.	Tons.
	Dunkerque	40	—	40
	Lille	—	1,910	1,910
	Jeumont	—	3,680	3,680
	Givet	—	800	800
	Longwy	—	520	520
	Nice	2,100	—	2,100
	Marseille	40,020	—	40,020
	Bordeaux	4,370	—	4,370
Coal	Nantes	25,990	—	25,990
	St. Nazaire	77,570	—	77,570
	St. Malo	1,600	—	1,600
	Caen	32,590	—	32,590
	Honfleur	2,490	—	2,490
	Rouen	73,030	—	73,030
	Le Havre	15,170	—	15,170
	Dieppe	3,870	—	3,870
	Bastia	570	—	570
	Other towns	—	300	300
	Total	279,420	7,210	286,620
	Marseille	18,400	—	18,400
	Bordeaux	9,340	—	9,340
	Les Sables	2,990	—	2,990
	Nantes	3,170	—	3,170
Briquettes	St. Nazaire	50	—	50
	St. Malo	7,570	—	7,570
	Le Havre	4,350	—	4,350
	Other towns	—	100	100
	Total	45,870	100	45,970
	Nice	110	—	110
	Marseille	6,440	—	6,440
	Bordeaux	2,550	—	2,550
	Nantes	1,300	—	1,300
	St. Nazaire	760	—	760
	Brest	130	—	130
	Morlaix	20	—	20
Coke	St. Malo	1,110	—	1,110
	Granville	130	—	130
	Cherbourg	70	—	70
	Rouen	50	—	50
	Le Havre	5,680	—	5,680
	Dieppe	120	—	120
	Modane	—	40	40
	Total	18,470	40	18,510
	Grand Total ten months of 1903	343,750	7,350	351,100

Amount of Coal imported into France direct from Germany in 1902 and the first ten months of 1903.

Kind	Destination.	1902. By Sea.	1902. By Land.	1902. Total.
		Tons.	Tons.	Tons.
	Bayonne	35,043	—	35,043
	Belfort	—	141,919	141,919
	Bordeaux	3,401	—	3,401
	Dieppe	1,108	—	1,108
	Dunkerque	—	32	32
	Givet	—	35,226	35,226
	Jeumont	—	114,399	114,399
	Lille	—	11,488	11,488
Coal	Longwy	—	109,725	109,725
	Lunéville	—	414,359	414,359
	Nancy	—	97,841	97,841
	St. Nazaire	22,452	—	22,452
	Valenciennes	—	32,559	32,559
	Granville	2,311	—	2,311
	La Rochelle	2,611	—	2,611
	Other towns	—	4,742	4,742
	Total	66,926	962,290	1,029,216
	Bellegarde	—	3,165	3,165
	Givet	—	18,224	18,224
	Jeumont	—	4,553	4,553
	Longwy	—	504,943	504,943
Coke	Lunéville	—	3,671	3,671
	Nancy	—	130,809	130,809
	Valenciennes	—	7,336	7,336
	Paris	55	—	55
	Other towns	—	587	587
	Total	55	673,279	673,334
	Anor	—	989	989
	Belfort	—	2,572	2,572
	Givet	—	522	522
Briquettes	Jeumont	—	3,424	3,424
	Longwy	—	601	601
	Nancy	—	7,409	7,409
	Other towns	—	129	129
	Total	—	15,646	15,646
	Grand Total, 1902	66,981	1,651,215	1,718,196

Kind.	Destination.	Ten months of 1903.		Ten months of 1903. Total.
		By Sea.	By Land.	
		Tons.	Tons.	Tons.
Coal	Belfort	—	126,890	126,890
	Givet	—	26,000	26,000
	Jeumont	—	18,430	18,430
	Longwy	—	86,860	86,860
	Lunéville	—	452,640	452,640
	Nancy	—	72,540	72,540
	Valenciennes	—	10,820	10,820
	Bayonne	43,570	—	43,570
	St. Nazaire	7,970	—	7,970
	Dieppe	15,820	—	15,820
	Boulogne	5,460	—	5,460
	La Rochelle	3,290	—	3,290
	Granville	4,040	—	4,040
	Rouen	800	—	800
	Marseille	1,260	—	1,260
	Other towns	—	4,760	4,760
	Total	82,210	798,940	881,150
Coke	Givet	—	39,170	39,170
	Jeumont	—	3,980	3,980
	Longwy	—	574,860	574,860
	Lunéville	—	9,110	9,110
	Nancy	—	149,500	149,500
	Belfort	—	1,530	1,530
	Other towns	—	1,080	1,080
	Total	—	779,230	779,230
Briquettes	Belfort	—	13,530	13,530
	Jeumont	—	2,240	2,240
	Longwy	—	960	960
	Nancy	—	5,190	5,190
	Valenciennes	—	650	650
	Other towns	—	910	910
		—	23,480	23,480
	GRAND TOTAL, ten months of 1903.	82,210	1,601,650	1,683,860

LILLE.

Enclosure in dispatch, dated Calais, 2nd February, 1904, from Mr. C. A. Payton, H.B.M.'s Consul at Calais.

Report of Mr. J. E. Walker, Vice-Consul at Lille.

1. Present consumption of coal per annum in the Lille district is about 1,500,000 tons; the proportion used for domestic purposes is a little under one-fifth of this quantity, the rest being for manufacturing purposes.

2. Principal sources of supply have been the collieries of the Nord and Pas-de-Calais Departments; also to a considerable extent Belgian mines, owing to their proximity.

3. No British coal has penetrated into this district except in the case of strikes. A few trials have been made to use British coal, but the results have not been satisfactory.

8. There appears no chance for British coal in this district; trials have not given the desired results, and, of course, transport is too dear to allow coal of better quality to compete with French.

LYONS.

Enclosure in dispatch, dated Lyons, 29th January, 1904, from Mr. Lionel C. Liddell, H.B.M.'s Consul at Lyons.

"Figures relating to the conditions prevailing in this Consular district ten years ago I have been unable to procure, nor any, except in one instance, later than 1901.

"Lyons not being a frontier town, it is difficult, and well nigh impossible, to obtain quite accurate statistics; at the same time, I have every reason to believe that the figures I give may be relied upon."—(*Extract from Mr. Liddell's dispatch.*)

1. The present consumption of coal in the Consular district of Lyons is as follows:—

Department of the Ain	114,100 Tons.
,, ,, Allier	564,700 ,,
,, ,, Cantal	36,100 ,,
,, ,, Creuse	61,600 ,,
,, ,, Isère	661,600 ,,
,, ,, Jura	101,800 ,,
,, ,, Loire	1,468,900 ,,
,, ,, Puy de Dôme	303,000 ,,
,, ,, Rhône	1,195,753 ,,
,, ,, Saône and Loire	974,100 ,,
,, ,, Savoie	72,900 ,,
,, ,, Haute-Savoie	34,700 ,,
	5,589,253 ,,

In Lyons itself (Department of the Rhône) the approximative amount used for domestic purposes is 263,868 tons; for manufacturing or steam purposes, 279,060 tons.

2. Department: Ain.

Source of Supply.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
St. Etienne	80,500			66,800		
Other French	43,800			43,700		
Foreign	—			—		
	124,300	128,328	20 7½	110,500	124,708	22 7
	1900.			1901.		
			s. d.			s. d.
St. Etienne	67,300			72,500		
Other French	49,000			40,200		
Belgian	1,600			1,400		
German	500			—		
	118,400	149,040	25 2	114,100	133,772	23 5½

Department: Allier.

Source of Supply	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average. Price.
	1898.			1899.		
			s. d.			s. d.
Commentry - - -	363,500			361,800		
Other French - -	254,000			275,000		
Foreign - - - -	—			—		
	617,500	386,303	12 6	633,800	433,524	13 7½
	1900.			1901.		
			s. d.			s. d.
Commentry - - -	310,900			291,300		
Other French - - -	297,100			272,100		
Foreign - - - -	—			—		
British - - - -	—			1,300		
	608,000	463,784	15 3	564,700	454,463	16 1

Department: Cantal.

	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average. Price.
	1898.			1899.		
			s. d.			s. d.
Champagnac - - -	21,000			19,500		
Other French - -	14,800			13,800		
Foreign - - - -	—			—		
	35,800	14,480	8 1	33,300	15,240	9 2
	1900.			1901.		
			s. d.			s. d.
Champagnac - - -	21,200			23,400		
Other French - -	12,500			12,700		
Foreign - - - -	—			—		
	33,700	17,172	10 2½	36,100	18,248	10 1½

Department: Creuse—

Source of Supply.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
Ahun	37,400			51,600		
Other French	15,400			13,500		
Foreign	—			—		
	52,800	29,144	11 0½	65,100	37,284	11 5½
	1900.			1901.		
			s. d.			s. d.
Ahun	46,100			44,200		
Other French	12,900			17,400		
Foreign	—			—		
	59,000	40,852	13 10½	61,600	45,484	14 9½

Department: Isère.

	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
St. Etienne	310,500			336,000		
Other French	220,500			253,000		
Foreign	—			—		
	531,000	620,844	23 5	589,000	712,300	24 2
	1900.			1901.		
			s. d.			s. d.
St. Etienne	366,000			373,900		
Other French	260,600			287,700		
Foreign	—			—		
	626,600	836,888	23 9	661,600	874,900	26 5½

Department: Jura.

Source of Supply.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
Creusot and Blanzy -	64,200			55,900		
Other French - -	22,600			23,900		
German - - - -	7,100			8,200		
Belgian - - - -	600			600		
Undefined Foreign -	—			200		
	94,500	88,032	18 7½	88,800	85,452	19 3
	1900.			1901.		
			s. d.			s. d.
Creusot and Blanzy -	30,200			17,800		
Other French - - -	38,500			35,200		
German - - - - -	18,500			42,900		
Belgian - - - -	1,800			5,400		
Undefined Foreign - -	200			500		
	89,200	92,588	20 9½	101,800	103,388	20 4

Department: Loire.

	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
St. Etienne - -	1,402,300			1,436,500		
Other French - -	102,800			94,600		
Foreign - - -	—			—		
	1,505,100	920,520	12 2¾	1,531,100	997,700	13 0½
	1900.			1901.		
			s. d.			s. d.
St. Etienne - -	1,524,800			1,376,400		
Other French - -	105,800			92,500		
Foreign - - -	—			—		
	1,630,600	1,257,520	15 5½	1,468,900	1,238,576	13 11

Department: Puy de Dôme.

Source of Supply.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
St. Eloy - - -	94,500			113,200		
Other French - -	171,300			184,900		
Foreign - - -	—			—		
	265,800	201,156	15 1½	298,100	236,876	15 11
	1900.			1901.		
			s. d.			s. d.
St. Eloy - - -	88,500			92,000		
Other French- -	196,100			207,800		
Foreign - - -	—			—		
British - - -	—			3,200		
	284,600	251,016	17 8	303,000	273,064	18 0½

Department: Rhône.

	1898.			1899.		
			s. d.			s. d.
St. Etienne - - -	975,400			980,700		
Other French - -	276,600			221,800		
Foreign - - -	—			—		
	1,252,000	1,080,728	17 5½	1,202,500	1,226,512	20 5

Source of Supply.	Amount Tons.	Value. £	Average Price.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1900.			1901.			1902.		
			s. d.			s. d.			s. d.
St. Etienne - -	1,015,000			988,500			779,243		
Other French -	274,100			243,900			358,201		
Foreign - -	—			—			—		
British - -	58,300			34,000			13,327		
Belgian - -	10,500			9,500			19,136		
German - -	7,200			4,500			25,846		
	1,365,600	1,805,868	26 5½	1,280,400	1,609,208	25 2	1,195,753	1,518,406	25 0½

Department: Saône and Loire.

Source of Supply.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
Creusot and Blanzy -	840,000			761,600		
Other French - -	393,200			349,600		
British - - -	—			700		
German - - -	1,900			4,000		
Belgian - - -	600			2,500		
	1,235,700	1,000,916	16 2½	1,118,400	1,055,208	18 11
	1900.			1901.		
			s. d.			s. d.
Creusot and Blanzy -	764,200			—		
St. Etienne - - -	—			113,500		
Other French - -	392,900			817,200		
British - - -	17,100			21,800		
German - - -	5,400			11,200		
Belgian - - -	4,200			10,400		
	1,183,800	1,239,676	20 11½	974,100	1,046,964	21 6

Department: Savoie.

	1898.			1899.		
			s. d.			s. d.
St. Etienne - - -	27,700			31,100		
Other French - -	34,900			52,900		
Undefined Foreign - -	300			—		
British - - - -	—			2,600		
	62,900	78,224	24 10½	86,600	96,504	22 3½
	1900.			1901.		
			s. d.			s. d.
St. Etienne - - -	35,200			36,200		
Other French - -	38,600			35,200		
British - - - -	4,300			1,500		
	78,100	102,312	26 2½	72,900	96,956	26 7½

Department: Haute-Savoie.

Source of Supply.	Amount. Tons.	Value. £.	Average Price.	Amount. Tons.	Value. £.	Average Price.
	1898.			1899.		
			s. d.			s. d.
St. Etienne - - -	16,800			19,000		
Other French - -	10,100			7,800		
Undefined Foreign - -	—			100		
	26,900	38,716	28 9¼	26,900	39,736	29 7
	1900.			1901.		
			s. d.			s. d.
St. Etienne - - -	16,500			22,000		
Other French - -	12,100			12,300		
British - - - -	3,500			400		
	32,100	45,864	28 7	34,700	49,892	28 9½

3. It will be observed from the foregoing Tables that British coal made its appearance in the Departments of Allier and Puy de Dôme in 1901: in the Department of the Saône et Loire in 1899, where there has been a fair increase, namely, from 700 tons in 1899 to 17,000 tons in 1900, and 21,000 tons in 1901: in the Department of the Rhône, British coal was imported in 1900 to an amount of 58,000 tons, but this seems to have been brought about by a shortage in the local supply, as a drop to 34,000 tons is recorded in 1901, and a further decrease to 13,327 tons in 1902.

In the Department of Savoie, British coal began to be imported in 1899, and though 1900 witnessed a growth in the demand, yet the succeeding year brought a fall, whilst in the Haute-Savoie the year 1900 shows a total of 3,500 tons as against 400 tons in 1901.

The total amount of British coal imported into this Consular district is, however, insignificant, amounting to 62,200 tons in 1901, out of a total of 7,900,000 tons imported into France.

Questions **4** and **5** do not apply.

6. In 1900, there was a considerable sudden demand for foreign coal, including British coal, owing to a shortage in the supply obtainable from local sources caused by a strike of miners. As was only natural, this demand for foreign coal slackened upon the resumption of work and a return to the normal conditions regulating the industry.

It is doubtful whether British coal could ever successfully compete in a district that is at the door of a coal-bearing region, when the cost of freight and custom duty is taken into consideration.

7. The railway rates chargeable on British coal are as follows:—

From St. Nazaire to Lyons - -	12s. 10d.	per ton.
,, Bordeaux - - - -	12s.	,,
,, Marseilles - - - -	10s.	,,

The following tariffs apply to native and foreign borne coal:—

	Tariff for Native Coal.	Tariff for Foreign Coal		Tariff for Native Coal.	Tariff for Foreign Coal.
	Fcs.	Fcs.		Fcs.	Fcs.
300 kilometres - -	9·40	9·40	700 kilometres - -	15·40	19·40
400 ,, - -	10·90	11·90	800 ,, - -	16·90	21·90
500 ,, - -	12·40	14·40	900 ,, - -	18·40	24·40
600 ,, - -	13·90	16·90	1,000 ,, - -	20·90	26·90

8. See Answer to No. 6.

9.

	Tons.
1898.—From Loire basin - - -	1,340
Le Creusot and Blanzy - -	80,000
1899.—From Loire basin - - -	129,000
Le Creusot and Blanzy -	54,000
1900.—From Loire basin - - -	114,000
Le Creusot and Blanzy -	57,000
1901.—From Loire basin - - -	119,000
Le Creusot and Blanzy -	40,000
1902.—From Loire basin - - -	86,085

10. I do not anticipate that the demand for coal of any description is likely to increase to a considerable extent. Water-power is being very extensively used in the mountainous districts for the supply of motor-power and for lighting purposes. In Lyons itself half the town is lighted by the Jonage Company, which derives its power from the river Rhône. It is further reported that the electric Tramway Company is to draw its power next year from works established on the river Drac, near Grenoble.

At present coal is used for generating purposes. Belgian coal seems to set the market price of coal.

MADAGASCAR.—*See* ANTANANARIVO AND TAMATAVE.

MARSEILLES.

Mr. M. C. Gurney, H.B.M.'s Consul-General at Marseilles, gave evidence before the Royal Commission on Coal Supplies on February 16, 1904.

(Final Report, Part X., p. 241.)

MARTINIQUE.

Enclosure in dispatch, dated Martinique, 29th February, 1904, *from Mr. H. J. Meagher, H.B.M.'s Consul at Martinique.*

1. In 1903, 44,416 tons of coal were imported into Martinique. The bulk of this was imported by the Compagnie Générale Trans-Atlantique for its steamers. Small quantities are also imported for the sugar factories and for the French warships on the West India Station.

No coal is imported for domestic purposes.

The average quantity imported annually during the last eight years was 60,202 tons.

2. Sources of supply of Coal imported into Martinique :—

Year.	French Coal.	Foreign Coal.					Total.
		France.	Great Britain.	United States, America.	British Colonies.	Other Countries.	
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1894	—	—	Returns not	obtainable.	—	—	—
1895	—	—	Returns not	obtainable.	—	—	—
1896	1,992	1,100	18,607	37,567	344	—	59,610
1897	338	840	24,987	34,476	—	—	60,641
1898	1,658	1,463	16,152	46,761	—	1	66,035
1899	2,040	1,009	11,698	46,437	54	17	61,255
1900	1,444	2,108	1,244	65,155	—	42	69,993
1901	252	2,265	853	59,549	—	—	62,919
1902	1,380	3,780	—	51,384	205	—	56,749
1903	2,864	1,848	4,305	34,934	365	100	44,416

N.B.—1,000 kilos. = 1 ton.

3. The greater part of the coal imported into Martinique is landed at Fort de France. Small cargoes are sometimes landed at different points on the coast for the sugar factories.

4. The Superintendent of the Compagnie Générale Trans-Atlantique has kindly supplied the following figures respecting the cost of coal imported by his company and delivered alongside their wharf at Fort de France :—

In 1895 Cardiff coal cost 20·97 francs per ton and 19·86 francs per ton.

In 1895 American coal (Berwind White) 24·43 francs per ton. Since 1895 no British coal has been imported by the Company.

At the present moment American coal (Berwind White "Eureka" coal), the sole kind imported by the Company, costs 21·54 francs per ton.

5. No British steamers coal at Martinique.

6. In 1896 British coal imported directly from Great Britain formed 31·21 per cent, of the total imports of coal.

In 1903 British coal imported directly from Great Britain formed only 9·69 per cent. of the total imports of coal.

The reasons for this decrease are apparently—

(1.) Cheaper freights from the United States of America ;

(2.) Shorter time occupied in transit from shipping port—orders can be received a fortnight after cabling ;

(3.) The grates of the steamers of the Compagnie Générale Trans-Atlantique have been arranged to burn American coal, and the company declares itself quite satisfied with the results obtained with American coal, less stoking being required.

No British coke is imported into Martinique.

7. All the coal imported into Martinique remains in the seaports ; none is shipped into the interior.

8. I am informed that the Compagnie Générale Trans-Atlantique has entered into a twenty years contract with the Berwind White Coal Company. On the expiration of this contract the company will not contract for Welsh coal unless they see their way to benefit considerably by making the change.

9. There are no exports of coal or coke from Martinique.

10. All coals imported into Martinique are placed on the same footing. There are no Customs duties on coal. Octroi dues are 0·25 francs per 100 kilos ; Statistique dues 0·15 francs per ton, and wharf dues 1·50 francs per ton.

NANTES.

Enclosure in dispatch, dated Nantes, 8th February, 1904, from Mr. R. Stovin Warburton, H.B.M.'s Consul at Nantes.

1. About 1,200,000 tons, of which probably 200,000 is used for domestic purposes.

2. See Table annexed.

3. British coal from this district penetrates inland as far as Pontivy, Rennes, Laval, Alençon, Chartres, Orleans, Nevers, Bourges, Chateauroux, Poitiers, and La Roche-sur-Yon. Facilities, railway.

4. British coal per ton in—

	Large.		Small.	
	s.	d.	s.	d.
1894 - -	13	8	12	9
1895 - -	13	6	12	10
1896 - -	14	2	12	6
1897 - -	16	10	12	10
1898 - -	19	2	14	0
1899 - -	20	0	12	10
1900 - -	28	0	14	5
1901 - -	22	0	16	0
1902 - -	19	3	14	0
1903 - -	19	3	13	2

Foreign Coal.

There cannot be any regular quotation given for foreign coal because, with the exception of the German during the years 1891, 1892, and 1893, the importations were not for public consumption but only for experiment, by a few firms, in order to test their quality, with the result that they were very soon discontinued.

With regard to German coal there is no fixed quotation because there is a syndicate formed in Germany with the object of dumping it on foreign markets and cutting out the British coal, and in order to do this they take the price of British coal as a guide and then fix the German at a lower price to give it an advantage.

There is one great French importing firm which deals in this coal, and as I am informed has bound itself by an agreement to do all in its power to promote the sale of German coal, and that any loss which may be incurred by reducing the price below that of British coal is made good to them by the syndicate. I am informed that the customers of this firm (which also deals in other coals) when they give an order for British coals have been refused them, unless they consent to take part of the order in the German product, and in order to get the English have been obliged to do so.

The rebate allowed off German coal to tempt buyers to take it instead of British cannot well be put at any certain figure, and depends probably on the exigencies of each particular case, but it is sufficient to make a sensible reduction and give a considerable advantage to the taker of it.

The German is a far better coal than the British ton for ton, the heat producing power according to the tests made at Nantes being 140 of the former against 100 of the latter, and it is a higher priced coal, but the rebate is calculated at a figure which makes it cheaper in reality.

All the coal sold to the public here is Welsh, but beyond this I have not been able to get any particular description of it.

The other kinds imported are for gas and special uses and consigned to the firms which require them, and not quoted in the market to the public.

5. Yes. On an average of the last ten years 15,000 tons per year have been so shipped.

6. If you compare the return for 1903 with that for 1894 it has not fallen off but increased considerably, while fluctuating in the intermediate years owing entirely to local causes, but with a gradual increase till 1900, in which year it reached the maximum; but in 1902 and 1903 there was a considerable falling off owing to the displacement of British by German coal.

7. The rates vary according to the tariffs of the different railway companies and their mutual arrangements, but may be taken as one halfpenny per ton for a kilometre (five-eighths of a mile) for distances up to sixty-two miles, with a small reduction for longer distances according to the length of the journey.

There are no differential rates in this district at present.

8. By taking more trouble to satisfy customers. All the importers whom I have consulted ask that British coal sent to Nantes should be better wrought, so as to enable it to compare more favourably with German coal than it does at present, it being a frequent subject of complaint with their customers that it contains stones and other impurities from which German coal is comparatively free.

Importers also complain that they are placed at a disadvantage by some of the conditions in the charter imposed upon them by the British Chamber of Commerce (Welsh Coal Charter, 1896) in which, according to them, the interest of the colliery proprietor and shipper alone has been taken care of, while that of the buyer or receiver of the cargo has been completely ignored, whereas the German charters are much more equitable to all concerned in the business.

The importers also complain that while the Germans ask consumers to let them know exactly the description of coal they wish for, and when told carry out their requirements with mathematical precision in such details as the amount of humidity, volatile substances, ashes, sulphur, vaporisation, etc., etc., the English do nothing of the kind but just ship it off as it comes ("tels quels" is the expression used) and will not take the trouble to look out for the composition which would give regular and absolute satisfaction to their clients.

The only suggestion I can give is that colliery owners should remedy these complaints.

One important coal importer writes to me as follows:—

> "Point sur lequel j'insisterais enormement: le jour
> "où les Anglais se seront bien convaincus de ce
> "qu'il faut chez nous—laver leurs charbons ou les
> "trier—ils seront surement les maîtres de la place."

9. No. A moderate quantity of patent fuel is exported to the French colonies for the use of the Marine Authorities but it is of native manufacture and made at Nantes.

10. I do not know of anything that can affect the competitive power of British coals in this district except what I have stated in reply to Question 8. The only competing coal is the German, and it has exactly the same import duty to pay.

Our own export duty has certainly not done so in my opinion; it could only do so by increasing the price to such an extent as would interfere with the consumption of British coal, and this it has not done, although it is paid entirely by the French consumer. If proof is desired as to how little effect this duty has on the consumption of our coal in this district through the small addition it makes to the cost of it, the Commission need only refer to the year 1900 when English coal reached the highest figure recorded during the last ten years, viz., 28s. per ton, and it will be seen that in that year we sold them 1,533,000 tons, and in the years 1901 and 1902, when with the export duty added it only cost 19s. 3d., we only sold them 1,459,000 tons, and 1,130,000 tons in each of these two years.

I have seen that evidence has been given before the Commission that the export duty is paid on our side by the colliery proprietor, the miner, and the shipper, but as concerns my district this is entirely wrong. It is paid by the importer, and by him charged to the consumer, and by nobody else, and this not a matter of opinion or surmise, but one of fact, and is provided for in the contract between the importer and the consumer.

The importers of British coal inform me that all their contracts contain the following clause:—

> "If for any reason whatever any tax is imposed
> "while the present contract lasts, such tax shall be
> "paid by the purchaser."

And a case in point has been given to me (lest there should be any possibility of a mistake) in these words:—

" If, therefore, a factory has a contract for English " coal at 15s. per ton, and subsequently the House " of Commons should vote an addition of one shilling " to the duty, the price becomes automatically 16s."

I think this settles the question as to who pays our export duty.

The French importers, of course, object to our export duty, and want it taken off just as much as do our exporters, but curiously enough for contradictory reasons, each side insisting that it falls on themselves.

There are no new markets in this country to take the place of any that may be lost.

TABLE.

Sources of Coal Supply in the Consular District of Nantes during ten years from 1894 *to* 1903.

	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
British Coal	792,412	926,369	1,005,823	1,115,092	1,127,982	1,297,291	1,521,966	1,459,250	1,130,048	1,098,106
German Coal	—	—	—	—	—	—	—	—	57,549	133,385
Belgian Coal	540	—	—	—	—	—	1,365	300	725	—
American Coal - -	—	—	—	—	—	—	9,346	23,605	3,237	—
British Patent Fuel	—	—	—	—	—	—	—	—	16,325	15,494
German Patent Fuel	—	—	—	—	—	—	—	—	—	25,871
Belgian Patent Fuel	—	—	—	—	—	—	—	—	—	5,024
British Coke	1,113	161	1,674	2,886	1,668	8,914	9,915	6,958	2,614	6,320
German Coke	7,523	—	—	—	7,171	20,063	—	1,905	5,493	1,915
Belgian Coke	6,049	6,421	6,321	7,471	6,417	760	—	2,500	700	—

NICE.

Enclosure in dispatch, dated Nice, 19*th May,* 1904, *from Mr. A. McMillan, H.B.M.'s Consul at Nice.*

1. The present consumption of coal per annum in this district is about 115,000 tons, 85,000 tons being used for manufacturing purposes and 30,000 tons for domestic purposes.

2. The following have been the sources of supply during the last ten years up to the end of 1903—Newcastle-on-Tyne, Burntisland, Glasgow, Swansea, Cardiff; in France, Bessèges, La Grand Combe, and Valdonne (Gard), St. Etienne (Loire); and in Italy, Genoa.

3. British coal has penetrated inland to Grasse, Vallauris, Puget, Theniers, and Venice, carried by rail or in carts by road.

4. No British coal is delivered into railway trucks alongside vessels.

5. A very small proportion of the British coal imported is afterwards shipped for the bunkers of British vessels, perhaps about a thousand or two thousand tons annually.

6. There has been no falling off, on the whole, in the quantitiy of British coal and coke imported.

7. The railway rates chargeable on British coal are 5·40 francs per ton per 100 kilometres on the Paris-Lyons-Mediterranean Line and 5·56 francs per ton per 100 kilometres on the Line " du Sud."

There are no differential rates for British coal as compared with native coal or other imported coals.

8. So far as this Consular District is concerned the British mining industry appears to be maintaining its competitive power with the coalfields of other countries.

Mr. Taylor, Vice-Consul at Cannes, writes as follows:—" It is suggested that the sale of British coal in this district might possibly be increased by creating larger depôts, such as exist at Genoa, Marseilles, and elsewhere. This is the opinion of a local expert, who sees a growing tendency among Cannes merchants to draw part of their supplies from the larger depôts along the Riviera. Another expert complains of the 1s. English Export Tax, declaring that before it was instituted he was in the habit of selling 6,000 more tons per annum than at present."

9. There are no exports of coal from this district.

10. The import duty on coal is 25 centimes per ton, the same for British and non-British coal.

NOUMEA (NEW CALEDONIA).

Enclosure in dispatch, dated Noumea, 16*th May,* 1904, *from Mr. Bernard King, H.B.M.'s Acting Consul at Noumea.*

Replies furnished by Mr. Thomas Johnston, Lloyds agent.

1. About 20,000 tons of coal per annum is consumed on the island (of which 2,500 is for domestic purposes and 17,500 for steam purposes).

2. During the last ten years nearly all the coal has been imported from Australia (Newcastle and Woolongong) with the exception of about 10,000 tons imported from France in briquettes for the use of the French Navy during five years.

3. All the coal used inland, principally at Thio and Pam, is imported direct to those parts, or shipped from Noumea. Steamers and sailers are used to bring it from Australia—mostly steamers.

4. The average price of coals in Noumea is from 28s. to 32s. per ton, according to quality of coals sold; good Southern coals bring the latter price, ordinary Newcastle the former.

5. About 2,000 tons of coals are shipped for use of H.M. vessels on this station, but mercantile British vessels very rarely coal here, as they generally come provided with coals, or touch at Newcastle or Sydney for bunker coal.

6. No coke is imported here, as the local gas company make and supply the small quantity that is required for use in New Caledonia. The importations of British coals have fallen off during the last ten years owing to the French Government not having imported any for the French Navy during the last seven years, they getting their supplies from France (briquettes) by sailers which come here to load mineral for Europe; they can bring the coals at cheap rates as they are receiving bounty money from the French Government, being French built. The supply for all other purposes has not fallen off, but has increased slightly, owing to opening up of tram lines worked by steam (nickel and chrome mines at Nehoue, Nepoui, and Thio), which all use British coal imported from Australia.

7. No railway opened yet, and no local mines yet opened up.

8. British coals must be maintained, unless local coals were to be opened up; coals were lately prospected for by French capitalists, but up to the present no mines have been opened up.

9. None, and prospects of exporting are very remote.

10. A duty of 1 franc per ton was placed on coal some five years ago; previously it was admitted free, but this was done to raise revenue.

PARIS.

Enclosure in dispatch, dated Paris, 22nd January, 1904, *from Mr. A. P. Inglis, H.B.M.'s Consul-General at Paris.*

1. The Consular District of Paris comprises 18 Departments and extends in an eastward direction as far as the frontier; there are no statistics supplying the whole of the particulars required in these questions, dealing with such a large portion of the country, and it has been necessary to furnish the information obtained in tabular Statements. Accordingly, Statement No. 1 gives the consumption of coal in each of the 18 Departments comprised within the district during the year 1901, together with the several sources of supply and average market price per metric ton.

2. Statement No. 2 gives the coal consumption of the Railways and also the sources of supply.

3. Statement No. 3 gives the sources of coal supply, for the whole of France during the 10 years ended 1902. (Figures for the separate Departments are not obtainable.)

There are no statistics available giving the consumption of coal for domestic and manufacturing purposes for each Department, but the consumption for the whole of France for manufacturing and steam purposes was 17,064,000 tons, this amount exceeding a third of the total coal consumption in the country.

4. With reference to the penetration inland of British and other coal, reference is suggested to a very interesting chart constructed by S. Alexander, Director of the American Coal and Shipping Agency in Paris. The figures relate to 1899-1900, but the general conditions of the trade, so clearly set forth, have little varied. The chart comprises three maps.

No. 1 gives the total consumption of coal in France with the amount consumed in each Department, the colouring being so graduated as to show the intensity, while the figures give the amount, and include Algeria and the various railway companies.

No. 2 shows the consumption of British coal, together with the percentage of the same in relation to the total Departmental consumption.

Nos. 3 and 4 give similar particulars respecting Belgian and German coal.

The chart also shows clearly that the exports of the several countries are, as would be supposed, confined to the Departments situated along their respective frontiers, while the imports from the United Kingdom are chiefly found in the coastal departments.

The railway charges for the transport of coal from the ports of Havre and Dieppe to Paris and its environs are at the rate of 7 and 6 francs, respectively, per ton of 1,000 kilos, per truck of 10 tons, and to other parts of this Consular District 7 to 12 francs per ton for a truck load of 10 tons.

No British coal imported into this district is afterwards shipped for the bunkers of British vessels.

The imports from the United Kingdom continued during the period under notice to show an important increase, since in Belgium and Germany supplies were required for home industries.

Statement No. 1, *showing Consumption of the Coal of the several Countries in the District of the Consulate-General of Paris during the Year* 1901.

Departments.	Countries.					Total.	Average Price per Ton including Duty only.
	United Kingdom.	Belgium.	Germany.	France.	Other Countries.		
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*	*Tons.*	*Frs. Cts.*
Aube	—	31,300	500	105,800	—	137,600	34.69
Belfort (Territory of)	—	6,200	14,300	70,400	—	90,900	26.24
Côte d'Or	4,100	19,500	10,700	126,300	—	160,600	26.85
Doubs	—	8,800	26,500	149,600	100	185,000	—
Eure et Loir	2,400	31,700	—	66,200	—	100,300	27.67
Loiret	23,100	4,600	—	162,200	—	189,900	36.69
Marne	—	155,000	8,600	253,900	2,300	419,800	24.38
Marne (Haute)	—	33,300	17,100	291,700	—	342,100	23.53
Meurthe et Moselle	7,200	1,159,900	1,482,900	1,654,400	—	4,304,400	24.33
Meuse	—	51,100	10,000	92,300	—	153,400	26.19
Nièvre	—	—	—	175,500	—	175,500	22.65
Oise	7,400	103,600	700	405,700	—	517,400	24.69
Saône (Haute)	—	14,900	6,900	139,600	—	161,400	22.53
Seine	430,100	760,800	176,000	2,495,200	—	3,862,100	35.30
Seine et Marne	5,600	81,700	2,600	210,000	—	299,900	26.65
Seine et Oise	93,000	204,500	17,000	622,800	—	937,300	26.75
Vosges	—	171,300	40,500	174,300	—	386,100	26.46
Yonne	6,200	19,000	9,500	49,100	—	83,800	31.95
Totals	579,100	2,857,200	1,823,800	7,245,000	2,400	12,507,500	

Statement No. 2, showing the Consumption of Coal by the various Railway Companies in France and the Sources of Supply during 1901.

Company.	Countries.					Total.	Average Price per Ton.
	England.	Belgium.	Germany.	United States.	France.		
	Tons.	*Tons.*	*Tons.*	*Tons.*	*Tons.*	*Tons.*	*Frs. Cts.*
Paris-Lyon-Mediterranean	341,600	67,400	37,200	3,300	1,105,000	1,554,500	25.27
Nord	—	74,600	—	—	954,100	1,028,700	20.21
Orléans	377,700	13,700	—	200	407,400	799,000	25.69
Ouest	580,200	31,800	—	—	163,300	775,300	23.96
Est	5,000	362,600	30,700	—	355,500	753,800	19.57
Midi	155,800	—	—	—	200,300	356,100	19.93
Etat	222,900	—	—	—	15,100	238,000	27.20
Other Lines	24,600	800	—	400	99,600	125,400	23.08
Totals	1,707,800	550,900	67,900	3,900	3,300,300	5,630,800	

Statement No. 3, showing the principal Sources of Supply during the ten years ended 1902.

Year.	Countries.			
	United Kingdom.	Belgium.	Germany.	France.
	Tons.	Tons.	Tons.	Tons.
1893	4,434,000	4,889,000	2,037,000	25,651,000
1894	4,843,000	4,556,000	2,231,000	27,417,000
1895	4,944,000	4,516,000	2,041,000	28,020,000
1896	5,089,000	4,593,000	1,907,000	29,190,000
1897	5,491,000	4,402,000	2,077,000	30,798,000
1898	5,486,000	4,605,000	1,806,000	32,356,000
1899	6,720,000	4,752,000	1,871,000	32,863,000
1900	8,375,000	5,692,000	2,020,000	33,404,000
1901	7,900,000	5,493,000	1,956,000	32,325,000
1902	7,558,000	4,446,000	1,030,000	—

PONDICHERRY.

Enclosure in dispatch, dated Pondicherry, 12th March, 1904, *from Lieut-Colonel A. de C. Rennick, H.B.M.'s Consul at Pondicherry.*

1. Last year 10,000 tons of coal were imported into this port, the consumers being three cotton factories and two oil mills (cocoa-nut and ground-nut). There is no consumption for domestic purposes.

2. The following Table gives the supply of coal imported each year during the past ten years:—

Year.	Quantity.
1893	2,050 tons.
1894	1,200 ,,
1895	450 ,,
1896	2,380 ,,
1897	2,560 ,,
1899	4,900 ,,
1900	*6,030 ,,
1901	†9,480 ,,
1902	6,940 ,,
1903	9,800 ,,

The last import of British coal (Cardiff) was in 1893, when 639 tons were landed, after which date coal from Bankura, Bengal, has supplanted that of Cardiff.

* Rodier Cotton Mill opened.
† Goddart's Cocoa-nut Mill opened.

3. No British coal has been imported for the last ten years.

4. The prices fetched by Bankura coal varied from 12½ to 14¼ Rupees per ton.

5. Nil.

6. The import of British coal has ceased for the last ten years. The demand is all for Bankura (Bengal) and Singari (Hyderabad) coals; the former is preferred as being cleaner and cheaper.

7. Native coal is not railed but comes by steamer.

8. British coal is quite displaced by native coal, the demand for which is yearly increasing, owing to the establishment of new factories.

9. There is no export of coal, but occasionally a steamer replenishes her bunkers here, the coal being supplied by the agent of one of the factories, generally Best & Co.

10. Much has been done of late in prospecting operations, and great developments in the working of existing mines having taken place tend to make the importation of British coal unprofitable, although there is no import duty levied, both Pondicherry and Karikal being free ports.

RÉUNION.

Enclosure in dispatch, dated Réunion, 28th April, 1904, from Mr. John T. Piat, H.B.M.'s Acting Consul at Réunion.

Coal trade in this colony being practically nil, I can only reply to Question 8 of the Schedule.

The only coal introduced into the Colony (about 7,500 tons) is imported from Cardiff by two very important French Navigation Companies — the "Messageries Maritimes de France" and the "Compagnie Havraise Péninsulaire"—for exclusive use on board their ships. Patent fuel (about 3,200 tons) is used instead of coal for steam purposes and to a very slight extent for manufacturing purposes. Out of these 3,200 tons, 2,500 tons are used for steam purposes, by the "Compagnie du Port et du Chemin de Fer," a State concern, and the remaining 600 tons by private individuals for steam purposes (sugar industry).

The 2,500 tons used by the railway company can have but little interest to the trade; this fuel is manufactured in France with coal dust imported from the United Kingdom and is put up to contract every three years, but as the contract is not open to international competition, no one but a Frenchman can compete. It might be interesting, however, to note that the price paid by the Company for this fuel is 72 francs (£2 11s. 5d.) per ton, as against 45 francs (£1 12s. 2d.) for the best patent fuel from Cardiff. These prices apply to one ton of fuel delivered at the Port of Pointe des Galets.

As regards the 600 tons used for steam purposes in the sugar industry, I would venture to submit that this figure might possibly be gradually increased to some 5,000 tons per annum. Wood is employed in this Colony in preference to patent fuel, on account of a difference of price in favour of the former.

According to figures courteously supplied me by Monsieur Dolabaratz, manager of the *Credit Foncier Colonial* in this Island, the annual consumption of wood in sugar factories is equivalent to about 5,000 tons of patent fuel (Anchor—Cardiff). This quantity applies exclusively to the wood purchased by factory owners to make up for the insufficiency of wood cut down on their own estates.

The price of this wood (two cords being equivalent to one ton of fuel) is, delivered at the factories, about 50 francs (£1 15s. 9d.) the two cords as compared with 45 francs (£1 12s. 2d.) for a ton of fuel delivered at Pointe des Galets harbour. To these 45 francs must be added a sum of 7 francs (general railway tariff for any distance) for conveyance to the various districts, and a further sum of about two francs for carriage from the railway stations to the factories, thus bringing up the price of a ton of patent fuel, delivered at the factories, to 55 francs (£1 19s. 3d.) a difference, in favour of wood, of 3s. 6d. per ton.

It is, therefore, probable that should it be found possible to bring down the net cost of patent fuel to about £1 15s. per ton, the annual consumption could be increased, in the course of a few years, to some 5,000 tons. This result might, perhaps, be obtained by shipping the fuel on sailing vessels, when the freight being lower would permit of the reduction in price which I have just mentioned.

In conclusion, I would point out that, were it not for the fact that the Colony is now going through a very acute financial crisis, I would almost feel inclined to say that there is a fairly good opening in Réunion for any enterprising firm who would go to the trouble of giving serious attention to the patent fuel business.

ROUEN.

Enclosure in dispatch, dated Havre, 3rd March, 1904, from Mr. W. R. Hearn, H.B.M.'s Consul-General at Havre.

Report of Mr. R. J. Gage, H.B.M.'s Vice-Consul at Rouen.

1. The total annual consumption of coal in the town of Rouen and the immediate neighbourhood is, on an average, 400,000 tons, including bunker coal. Of this amount about 30,000 tons are bunker coal, about 70,000 tons are delivered for household purposes, and 310,000 tons for manufacturing purposes. Of the 310,000 tons used for manufacturing purposes, about half is British coal, the other half being French.

2. The sources of supply of the coal received each year at Rouen during the last ten years are shown in Table A.

3. The British coal imported into Rouen during the last ten years has penetrated into the east and into the centre of France, the extent of this penetration depending upon the competition of Belgian and German coals, these countries increasing or decreasing their exportation in accordance with their own industrial requirements. The facilities for the transportation have been afforded by barges and by rail.

4. The highest and lowest prices obtained for British coal delivered into railway trucks alongside vessels are shown in Table B, and are compared with coals from other sources

5. The proportion of British coal re-embarked on British ships as bunker coal is relatively small, British ships rarely taking more coal than is necessary to enable them to return to a British port.

6. The quantity of British coal imported into Rouen, after having considerably increased from 1899, on account of the Paris Exhibition of 1900, and of the strikes in the Departments of the Nord and of the Pas de Calais in 1902, has since decreased. This can be attributed to the competition on the markets of the east and centre of France of German coal, and of Belgian and French coals, which by special facilities accorded them, can now compete favourably with British, especially on the Paris market. Coals affected, Newcastle and Cardiff.

7. The tariff of railway rates, which applies to British coal, is the special tariff, P.V. No. 7. The rate chargeable under this tariff, for short distances, is from 7 to 10 centimes per ton per kilometre, including all accessory expenses, and from 4 to 5 centimes for greater distances, such as from Rouen to Paris. French coal profits by a much more advantageous decrease in tariff, for its different destinations, particularly for Rouen. Under this tariff the railway rate is about two and a half centimes per ton per kilometre; moreover, a still further reduction for French coal is under consideration. All foreign coal imported into France pays the same customs tax of 1 franc 20 centimes per ton; but French coal has another great advantage over all other coal imported by sea, owing to its sale price at the mines being specially fixed according to the distance it has to be transported. For instance, for French coal sold at Rouen a reduction of 1 franc per ton is made on the price current for the same coal in districts adjacent to the mines. All the mines in the North of France are syndicated.

The Belgian Government encourages the exportation of Belgian coal by according reduced railway rates to its frontiers.

In Germany there is no official bounty allowed for the exportation of coal into France; but the Ruhr Syndicate of Westphalia, through which all orders must pass, and which regulates the output of all the Syndicated mines, retains a percentage on all sales effected in Germany (these sales being made at remunerative prices), and this percentage (which is now said to amount to 6 per cent.) is distributed among the mines which export coal, so as to compensate them for the reduced prices which these mines have to accept in order to bring their coal into the French market.

8. From what has been stated in the preceding paragraph, it will be seen that special facilities are accorded to French, Belgian and German coals, in order to compete with British coal, whereas in England, where no such facilities exist, the tax on exportation injuriously affects the introduction of British coal into the French market.

9. The only exportation of coal from Rouen is that of bunker coal. This exportation rarely varies in quantity; the amount quoted in Answer No. 1 of this Report, having reference to bunker coal, can be taken as a general average.

10. Important works have been undertaken to increase the output of the French mines, and it is estimated that this increase will reach six millions of tons in the near future; the result of this will be that the French competition with all foreign coal will be even more acute.

ROUEN.

Table A.—Importation of Coal from 1894 *to* 1903.

Years.	From Germany.	From America.	From Belgium.		From Depts. Nord and Pas de Calais.		From Great Britain.		Total by Rail.	Total by Sea.	Total.
	By Sea.	By Sea.	By Rail.	By Sea.	By Rail.	By Sea.	By Rail viâ Dieppe.	By Sea.			
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1894	—	—	—	23,225	131,794	14,765	11,064	398,905	142,858	436,895	579,753
1895	—	—	—	23,955	152,450	16,964	7,657	419,378	160,107	460,297	620,404
1896	—	—	—	21,882	96,435	30,119	8,427	451,509	104,682	503,510	608,192
1897	—	—	—	15,575	113,049	19,335	6,669	466,925	119,718	501,835	621,553
1898	—	—	—	12,611	161,572	11,177	6,739	462,585	168,311	486,373	654,684
1899	—	—	—	9,438	121,439	3,424	7,862	644,085	129,301	656,947	786,248
1900	6	31	3,137	6,047	121,951	4,346	1,103	1,117,524	136,191	1,127,954	1,264,145
1901	4	3,649	1,454	—	135,585	12,738	3,537	887,048	140,576	903,439	1,044,015
1902	1,083	3,705	825	—	111,847	27,421	9,517	894,921	122,189	927,130	1,049,319
1903	115,783	—	—	—	—	—	—	796,283	—	912,066	—

ROUEN.

Table B.—Prices of Coal from 1894 *to* 1903.

Years.	British.					French.			
	Cardiff.	Swansea.	Newcastle.	Hull.	Swansea.	Large.		Medium.	
	Large.	Large.	Large.	Large.	Thro' and Thro'	Thro' and Thro' Domestic.	Thro' and Thro' Manufacturing.	Thro' and Thro' Domestic.	Thro' and Thro' Manufacturing.
1894	15s. 6d.	14s. 6d.	13s. 9d.	12s.	—	9s. 7d.	8s. 10d.	10s. 2d.	8s. 7d.
1895	15s. 3d.	14s. 3d.	13s. 6d.	12s. 3d.	11s.	9s. 2d.—9s. 7d.	8s.	—	8s. 5d.
1896	15s.	15s.—14s.	13s. 3d.—13s. 9d.	12s. 3d.	11s.	9s. 3d.	7s. 2d.—7s. 9d.	—	8s. 10d.
1897	15s. 3d.	15s.—14s. 3d.	13s. 5d.—13s. 9d.	12s. 4d.	11s. 6d.	9s. 3d.	7s. 2d.—7s. 9d.	—	8s. 10d.
1898	17s. 6d.	—	16s. 9d.	13s.	—	10s.—12s.	8s.	11s. 7d.	9s. 8d.
1899	19s.	15s. 4d.—17s. 9d.	—	14s. 9d.	14s. 9d.	10s. 10d.—12s.	8s. 10d.	11s. 7d.	9s. 8d.
1900	—	18s.	24s.	17s. 3d.	18s.	16s. 10d.—20s. 10d.	14s. 5d.	16s. 5d.	13s. 8d.
1901	—	14s.—15s.	—	—	17s.	16s.	13s. 3d.	15s. 7d.	13s. 8d.
1902	21s. 4d.	18s.—19s.	16s.	15s. 3d.	15s. 6d.	14s. 5d.	11s. 7d.	—	12s.
1903	20s. 1d.—20s. 6d.	18s. 6d.—17s. 6d.	15s. 4d.—15s. 7d.	15s. 9d.—15s. 3d.	15s.	13s. 8d.	10s. 10d.	11s. 8d.	—

NOTE.—German and American coal only passes through to Paris, prices not to be obtained here.
Freight per ton from Rotterdam to Rouen, 4s. 9d.—Exchange, Fr. 25 = £ Sterling.

SENEGAL, *see* DAKAR.

ST. MALO.

Enclosure in dispatch, dated Cherbourg, 26th February, 1904, from Mr. M. E. Loftus, H.B.M.'s Consul at Cherbourg.

Report of Hon. E. Henniker Major, Vice-Consul at St. Malo.

1. The consumption of coal, coke and patent fuel in this locality may be roughly stated as 220,000 tons, which rose to 243,000 tons in the year 1901, owing to certain difficulties between the Western Railway of France and the shipbrokers at Honfleur, but came down to 218,500 tons in 1902, and, although the returns for 1903 are not to hand yet, has not, I believe, been reduced. Of this total, the proportions may be said to be: Industries, 65,000 tons; domestic purposes, 35,000 tons; and the balance for the Western Railway.

2. The source of supply has been the United Kingdom entirely; but for 1903 the Western Railway held a contract for 18,000 tons of German patent fuel, a contract, I am told, brought about by the endeavour of local manufacturers of "briquettes" to increase their prices. Whether this amount has been delivered here or not, doubtless the quantity has been delivered to the Company here or at other ports, or per rail, and as the local firms used English small coal in the manufacture of their fuel, the import of British coal will be reduced by this change, the Western Railway never having had more than two or three trucks of German coal before, except in 1899, when, owing to strikes, Cardiff steam coal was wanting, and the want supplied by a ten-truck lot or two of German coal. One of the coal merchants here informs me that he has replaced English coal by German during the year 1903, in the measure of one-third of his imports, and he imports about 18,000 tons, manufacturing about 12,000 tons of 'briquettes' per annum, finding German coal purer and, as he loads it at Rotterdam, cheaper than English coal. On the other hand, coal merchants here declare that this is not true, and that the quality and price of British coal preclude any competition locally, and this, I believe, from observation, to be the fact.

3. It may be said that coal, delivered at this port, penetrates to about a radius of 100 kilometres, but of late, owing to some hitch at another port, Le Mans at 200 kilometres is being supplied hence, and as the town of Laval is usually furnished with its requirements from here, and is distant 150 kilometres, St. Malo-St. Servan may be said to be supplying coal to the Department of Ille et Vilaine, as well as a portion of the Cotes du Nord, Mayenne, and Sarthe, but the latter trade is only temporary. In so far as house coal is concerned, such large quantities of wood are still burnt, even in towns, and much more in country places, where charcoal is often used entirely for cooking, that the greater part of the coal, it may be said, is rather for gas and industrial purposes than for house consumption, although, with the new stoves, anthracite is used in many families for sitting-room fires. Merchants inform me that even French coal cannot compete here with British; and, except when the freights are very high, and a certain quantity of anthracite from La Mayenne is substituted, no coal but British is used, except what the Western Railway may bring over its own lines and for its own use.

4. Prices of coal here have been during—

Welsh.	£	s.	d.	Scotch.	£	s.	d.
1894 -		18	5	1894 -		14	10
1895 -		18	10	1895 -		15	3
1896 -		19	3	1896 -		17	2
1897 -	1	0	5	1897 -		17	2
1898 -	1	0	5	1898 -	1	8	0
1898 -	2	4	0	1899 -	1	2	5
1899 -	1	14	5	1900 -	1	1	3
1900 -	2	0	0	1901 -		19	2
1901 -	1	0	9	1902 -		17	8
1902 -	1	6	8	1903 -		17	8
1903 -	1	6	8				

per French ton on trucks, the Welsh coal being principally "Locket" and Scotch, formerly "Spring Soft," now coming principally from Methil. I should add, that the prices quoted in 1898 are those paid by persons not having a regular contract, as those holding a contract paid 10 francs less, at least.

5. A very small quantity is re-exported for use of British vessels, not so much as in former years, when steamships proceeded hence to Bilbao, and I only know of about 30 tons, excluding supplies to yachts (which this last year have been less important than usual), British vessels doing little in the timber trade, whereas Norwegian steamers are in the habit of taking 25 to 30 tons of bunker coal after each delivery of a cargo of deals.

6. Since writing the foregoing the Customs Return for the year 1903 has reached me, and I find that the import of coal of British origin amounts to 228,115 tons, as against 218,529 tons in 1902, and 5,549 tons from Rotterdam of German origin; so that I must withdraw my assertion concerning the coal merchant mentioned, as the quantity corresponds fairly with the proportion of his annual import, which he said had been supplied by German collieries.

I can only presume, until further inquiry, that the Western Railway has imported the patent fuel through other ports on their system, as I gathered from several good sources that a contract for the year 1903 existed for 18,000 tons of German patent fuel, to be imported *vid* St. Malo-St. Servan, which, knowing the English contract for this and other ports had lapsed, I believed could be true, till I noticed the absence of ships entering with such cargoes.

It may be said, therefore, that with the exception of the difference between the imports of 1901 and 1902 the importation of British coal has steadily increased during the past ten years.

7. In my Report for the year 1895 (contained in No. 1699, Foreign Office series) I mentioned the reduction of rates for French coal as unlikely to affect British imports to St. Malo, greatly on account of the line between this and Rennes being only a single one, and thus insufficient for the greatly increased traffic which would ensue; this and other causes, the principal one being that English coal is of better quality, have resulted in little or no change, and hence no differential rates exist. The Western Railway has, in order to compete with the carriage by water, reduced its rates hence for coal in complete truck loads, the rates being: Rennes, per ton, 2 francs 70 cns., distance 80 kilometres: Dinan, 2 francs, distance 40 kilometres; and Dinard, *vid* Dinan, 2 francs 50 cns., distance 60 kilometres, whereas by sea the latter place is distant about 2 miles. The canal rates are: St. Malo to Rennes, 3 francs to 3 francs 50 cns.; to Dinan, 1 franc 50 cns. to 2 francs per ton of 1,000 kilogrammes.

8. Possibly the visit of qualified agents, speaking French fluently, from time to time might do good, but it is difficult to advise the establishment of English agencies, as great objection is shown to those who are supposed to meddle with French interests, and dislike for the English is quite evident when such occasions occur, although at other times it is not visible to those who do not understand French manners and methods. I think a more careful wording of charter-parties, taking into consideration the meaning French law puts on the English text of these documents, and some definite understanding concerning the weight of cargoes delivered, might be useful; these cargoes are loaded under a tip at the loading port, and if weighed out here are usually discharged in baskets of about 1 cwt., and naturally turn out short, which is a cause of discontent to both seller and buyer, as well as to the shipowner and receiver of cargo. It is usual to allow 1½ per cent. in lieu of weighing, and although the Rennes Appeal Court has lately decided

that such a reduction cannot legally be claimed, yet masters of ships say that, if asked to give this they would be afraid to refuse, fearing that with the method of weighing they would turn out short; and on the other hand merchants here complain of deficiencies up to 3 per cent. and 4 per cent., based, they declare, on railway weights given by the Western Railway, while an English shipowner complained to me, his vessel—cargo 280 tons—having turned out 45 tons short on trucks! Yet only one error in weighing, about 3 tons, could be found, and original figures were placed in my hands by the Railway Company's inspector. I think, however, that the method of weighing the railway trucks is defective here, for they are weighed without being uncoupled, the engine simply slacking, a well-versed employé being quite able to raise his lever at the right moment; but my impression is, having been asked to see the operation, that if tired or in a hurry, it is more than likely large mistakes are made, possibly unperceived, but which cause friction on both sides; the different Chambers of Commerce should be able to arrange such matters, which are detrimental to all concerned.

9. There are no exports hence to other countries.

10. The import duty is the same as elsewhere in France, 1 fr. 20 cns. and 10 cns. "statistique" due to customs, and there is nothing, as far as I can see, detrimental to the competitive power of British coal, except—and this affects shipping more than actual cargoes—the fact that here it often happens that there is only one tide in the day, as if high water is before 6 a.m. or after 8 p.m., a payment of a minimum of 50 francs, which two ships can share, must be made for opening the lock gates, and as advantage is taken of this for detention of vessels, it is likely to cause extra freight to be asked; it is certainly the cause of much grumbling amongst shipmasters, and I think by no means without reason, seeing how worried they often are by the endless telegrams they receive if delayed. There have also been times when there was a great dearth of trucks at this port, and delays have occurred which masters and owners have complained of, although perhaps demurrage has been paid; of late I am glad to say this state of things has improved.

With reference to the purity of coal complained of as stated already by a coal merchant, I have often heard masters say that they were astonished at the careless way in which coals were mixed on arrival after their having taken, by order, special care to see that the coal at the loading port was not mixed. I may add that merchants here, in so far as Welsh coal is concerned, import rather a good all-round coal, suitable for all purposes, and comparatively little best coal gets here. The railway company, the gasworks at Rennes, St. Malo and Dinan, are the largest importers here, while for threshing grain no less than 20,000 tons was imported during 1903.

When tons are mentioned in this Report, except as regards the railway and canal rates, 1,015 kilogrammes is meant, and not the French ton of 1,000 kilogrammes.

TAHITI.

Enclosure in dispatch, dated Tahiti, 26th February, 1904, from Mr. R. T. Simons, H.B.M.'s Consul at Tahiti.

1. No coal from the United Kingdom is imported into Tahiti, and no coal is used at Tahiti for domestic or manufacturing purposes. Accordingly, the quantity consumed annually depends entirely upon the frequency of the visits to this island of French or foreign vessels of war, the consumption varying in these circumstances from 4,000 to 2,000 tons per annum.

2. As explained above, all coal landed at Tahiti is for steam purposes—principally for the use of the French Navy. The greater part of our supplies comes from France in the form of "briquettes"; but during the past ten years about 5,000 tons of coal have been imported from New South Wales (Newcastle), and about 800 tons from Westport, New Zealand.

3. No British or other coal has penetrated inland, and Tahiti has no facilities for the transportation of the same.

4. British colonial coal, furnished at Tahiti to British and foreign vessels of war, has been delivered in lighters alongside ship at about 47s. 6d. per ton for Newcastle (N.S.W.) coal and 57s. 6d. for that from Westport (N.Z.). There are no coaling wharves or railways at Tahiti.

5. During the past ten years about 1,500 tons of British colonial coals imported into this colony have been shipped into the bunkers of British vessels, viz.:—Newcastle (N.S.W.) coal, 700 tons; Westport (N.Z.), 800 tons.

6. *Nil.*

7. *Nil.*

8. *Nil.*

9. No.

10. At the moment there is nothing of interest to report in this connection. On the completion of the Panama Canal, however, there will doubtless be a demand in this region for Welsh and other steam coal.

TAMATAVE (Madagascar).

Extract from dispatch, dated Tamatave, 16th March, 1904, from Mr. A. Sauzier, H.B.M.'s Consul at Tamatave.

1. Coals do not exist in Madagascar, or at least have not been found as yet.

2. Whatever coals there are have been imported from France and Great Britain.

3. There are no roads in Madagascar, save one from Mahatsam to Antananarivo, the capital. A ton of coals to be taken from Tamatave to the capital would cost from £12 to £14.

4. Coals are not used for domestic purposes; the railway, which is only seven or eight miles long, a few tugs, and smithies use coals for steam purposes.

5. A ton of coals on shore at Tamatave costs from £3 to £3 8s.

6. Tamatave not being a coaling station and having no accommodation for quick shipping of coals, very few steamers call here, and no regular importation is made annually.

7. A small quantity of British coals has been imported; but the French authorities refuse to take any but French coals, in the shape of patent fuel, which is from "Lens et Meurchin."

8. A certain quantity of Cardiff "Royal Briquettes" of the mark "Crown," was imported last year and cannot be sold unless at great loss.

9. At present, at Tamatave, there are about 2,000 tons of patent fuel, and that quantity will last for many months yet.

10. The French Government has two coal depots, a small one at Ste. Marie Island, and a large one at Diégo Suarez.

11. Coals do not pay duty on entering.

12. From 1896 to 1902, inclusive, £184,777 worth have been imported into Madagascar from France and Great Britain.

GERMAN EMPIRE AND PRUSSIA.

BREMEN-BREMERHAVEN.

Enclosure in dispatch, dated Hamburg, 28th January, 1904, from Sir William Ward, H.M.'s Consul-General at Hamburg

Report of Mr. Robert Boyes, Vice-Consul at Bremen-Bremerhaven.

1. This cannot be ascertained.

2. Vide Table "A" annexed to this Report.

3. Excepting a very small quantity sent to Hanover, it does not penetrate at all.

4. Vide Table "A" annexed to this Report. Add 3s. for storing and placing alongside the vessel.

5. This cannot be ascertained.—[About 550 British Steamers come annually to the Weser; it may be estimated that every one will bunker about 50 tons, which would equal about 27,500 tons of British Coal annually.]

6. Imports have gradually increased, especially in the years 1899 to 1902, by about 20 per cent., as compared with the years 1893 to 1898.

7. No coal is transported by rail in Bremen district. No differential charges exist on British Coal.

8. This is entirely a matter of price.

9. In 1902 Exports were

British Coal for ordinary use	57,840	tons
ditto for ships' use	108,192	„
Total	166,032	„
German Coal for ordinary use	46,513	tons
Ditto for ships' use	359,348	„
Total	405,861	„

The exportations and "ships-use" of British Coal has increased about 50 per cent. since 1898. The same may be said of German Coals, about 25 per cent. since 1898.

10. *Nil.*

TABLE A.

Import of Coal and Coke into Bremen and Bremerhaven during the years 1893 to 1903, both inclusive.

	Prussia.			Oldenburg.			Hamburg.			Other North German States.			Great Britain.			Belgium.			United States of America.			All Other Countries.			Summary.		
	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.	Tons of 1,000 Kilos.	Value in £ Sterling.	Per Ton.			
			s. d.			s. d.			s. d.						s. d.			s. d.			s. d.			s. d.			
1893	414,007	229,145	11 0	70	50	14 3	149	140	18 9	65	64	—	158,405	121,803	15 4	—	—	—	—	—	—	Austria 11	13	13 8	572,708	(?)421,216	—
1894	401,661	290,185	14 5	60	48	16 0	93	94	20 2	200	158	—	162,156	118,795	14 8	—	—	—	88	134	30 5	20	18	18 0	564,278	409,431	—
1895	344,887	257,457	14 9	235	146	12 5	190	200	21 1	182	140	—	189,303	132,278	14 0	—	—	—	—	—	—	100	77	15 5	534,899	390,347	—
1896	413,111	301,310	14 7	365	293	16 0	—	—	—	50	44	—	214,965	147,823	13 9	—	—	—	6	5	16 8	—	—	—	628,497	449,475	—
1897	487,596	345,928	14 2	617	483	15 8	151	138	18 3	71	54	—	195,668	139,083	14 2½	80	73	18 3	36	33	18 4	—	—	—	684,221	485,790	—
1898	475,064	341,465	14 5	656	600	18 7	619	885	28 7	201	241	—	183,576	133,688	14 5	130	115	17 8	—	—	—	56	52	18 11	660,303	476,941	—
1899	532,998	384,098	14 5	269	236	17 6	1,195	1,768	29 7	185	155	—	230,222	167,239	14 6	150	136	18 2	—	—	—	3	3	20 0	765,022	558,685	—
1900	638,314	508,791	15 11	503	616	24 5	2,131	3,569	33 6	195	160	—	237,298	218,108	18 4	180	153	17 0	5,503	3,605	13 1	35	—	—	884,160	735,038	—
1901	555,857	460,249	16 7	989	989	20 0	3,254	5,866	36 0	732	680	—	325,048	258,041	15 11	120	106	17 8	6,690	4,348	13 0	Austria 53	39	14 8	892,743	730,319	—
1902	639,580	502,327	15 8	897	764	17 11	3,411	6,128	35 11	755	677	—	288,704	222,197	15 4	160	145	18 2	12,450	8,092	13 0	Austria 9	7	15 7	945,968	—	—
	4,903,075	—	—	4,661	—	—	11,193	—	—	2,636	—	—	2,185,345	—	—	820	—	—	24,773	—	—	287	—	—	7,132,799	—	—

REMARKS.

Bremen is the place where British and Westphalian Coals meet on an even basis. The railway freight rates from Westphalia average :—
M 4·50, for coal to be exported into foreign countries.
„ 5·40, for coal to be burnt at sea in steamships.
„ 5·80, for coal to be used in households on shore.
The sea freight rates are about 4s. from the East Coast of England and Scotland, and about 6s. from Wales. These sea freight rates sometimes vary considerably
A time has been a few years ago when freight rates from the East Coast of England rose up to 10s. per ton.
Storing coal and delivering it up to along a ship's side makes an expense of M 3.
The Statistical Office does not separate coals from coke and fuel, but the import of coke and fuel is so insignificant that it scarcely affects the average price.
American coal comes over generally freight free as ballast ; its ships have no cargo of D.W.

DANTZIG.

Extract from dispatch, dated Dantzig, 28th January, 1904, from Colonel A. M. Brookfield, H.M.'s Consul at Dantzig.

1. The consumption of coal in this consular district is difficult to state, because there are no official statistics issued on this subject. I can, however, submit the following indications from Upper Silesia as to the supply of Silesian coal to this district, viz. :—

	Tons
1898	915,614
1899	958,207
1900	994,899
1901	1,078,072
1902	1,061,522

Tons at 1,000 Kgs.

There were also sent to the ports in this district—Dantzig, Elbing, Königsberg—

	Tons.
1898	227,166
1899	253,922
1900	279,848
1901	277,872
1902	262,824

Tons at 1,000 Kgs.

The import of British fuel at the ports of Dantzig, Königsberg, and Memel is estimated at 650,000 to 700,000 tons per annum. The quantity of coal consumed at Dantzig is not certain ; there are only indications about the import over sea of British fuel to Dantzig, viz. :—

	British.			Silesian.
	Coal.	Coke.	Patent Fuel.	By Rail.
1895	275,540	4,011	—	82,512
1896	289,418	5,564	425	63,664
1897	311,848	9,915	427	81,344
1898	263,383	6,789	—	152,542
1899	251,459	5,834	—	180,006
1900	265,473	8,140	—	187,943
1901	248,795	8,049	—	188,649
1902	223,692	2,904	2,399	174,010
1903	230,000 (about)	—	—	—

All in Tons at 1,000 Kgs.

Besides these quantities there was an import of 15-17,000 tons of Westphalian coals and coke, mostly for the German Navy. It is reckoned that of the import of British fuel about two-thirds were forwarded on by rail or craft to the interior, mostly for manufacturing and smithy purposes.

2. The sources of supply for West Prussia are, as already stated, mostly Silesian collieries, whose production in 1903 amounted to—

Coals	about 30,000,000	tons.
Lignite	„ 950,000	„
Coke	„ 700,000	„
Patent Fuel	„ 190,000	„

Taking the provinces of East and West Prussia into consideration, it is estimated that the whole demand of coal in this district will reach about 2,000,000 tons per annum, whereof one-third is covered by British import.

3. As far as steam coals are concerned, British coal transhipped into craft competes successfully with Silesian at places which have no railway communication. Gas and smithy coals go so far as Thorn, Bromberg, Nakel, Inowraclaw and all over the provinces of East and West Prussia by craft and by rail.

4. As to prices of coals, there are only available the statistics of the Dantzig Chamber of Commerce, as follows :—

	Scotch Large Steam. *	Smithy Coals. *	North-umberland Steam Small. *	Silesian Large. †
	Marks.	Marks.	Marks.	Pfennigs.
1894	44·46	42·75	—	82 - 84
1895	39·92	35·92	—	81 - 83
1896	40·31	35·	—	80 - 83
1897	44·58	44·88	27·29	80 - 84
1898	45·51	50·08	34·	82 - 86
1899	51·25	57·08	39·50	90 -100
1900	69·	80·50	58·	99 -110
1901	49·25	65·92	33·67	98 -102
1902	45·17	61·50	32·83	98 -100
1903	43·	56·	30·25	94 - 97

* In Marks per last of 3,000 Kgs. free on truck Newfairwater.
† In Pfennigs per 50 Kg. free truck Dantzig.
All prices on average over the respective year.

5. British coal is here and there shipped again for bunkers of British vessels, but on a very limited scale, certainly not more than 1,000 tons per annum.

6. The import of British coal and coke has undoubtedly fallen off during the last ten years, and this affects principally Northumberland large steam, prime Scotch and Midland Nut coals, which sorts cannot compete with Silesian coals at present prices. Another reason for this fact is that the railway lines in this province are extending more and more, and many places, which formerly bought British coal by water, have now railway communications, and therefore prefer Silesian fuel. It may be also mentioned on this occasion that the exorbitant prices of British coals some years ago, caused many consumers to try Silesian coals, which they found quite profitable, and they now stick to them.

7. British coals are forwarded on our State railways in trucks according to Tariff 3, the cheapest rate on bulk goods. Westphalian coals imported over sea pay the same charge, only Silesian coals have an extra tariff. For instance a truck of coal from Silesia to Dantzig costs M. 88 to M. 89 per 10,000 Kg., whilst British coal forwarded from Dantzig to Silesia would be charged M. 145 to M. 150 for the same quantity. This difference is further increased for British coals sent to the interior, which then have to pay freight from Dantzig to the respective place, whilst the freight from Silesia to most places of the provinces is cheaper than to Dantzig, because they lie nearer to Silesia.

8. Under present circumstances British collieries can only compete successfully in our market by selling at cheap prices and by a most careful method of screening and shipping the coals. British coals, as a rule, contain a lot of dust and are unequal in size, whilst Silesian collieries have the most perfect appliances for screening and separating their output. The coals are sent off from the pits in Silesia quite free of dust ; most of the collieries make large lumps, two kinds of cobbles, two to three sorts of nuts, peas and small, and many of them wash the coals.

They produce bituminous and flame coals—thus every buyer can get exactly what he requires. Besides, it is of the greatest convenience for every consumer to receive his fuel in single trucks, whilst coal merchants must import British coal in whole cargoes. Also Silesian coke and smithy peas from the district of Waldenburg find more and more buyers in this province.

In the last two years Dantzig coal merchants would have been able to import many thousand tons more from Great Britain, had it not been for the export duty, which

renders competition in better classes of coal, such as Northumberland large, almost impossible. It is generally believed here that the import of British coal will fall off still further unless the Coal Tax is removed. The industry in Silesia is not consuming so much coal just now, and as the collieries anticipated a mild winter they were anxious to keep off British coal along the Baltic coast. With this object they propose to abate prices from 1st of April considerably.

9. There is no export of coal from Dantzig except a few thousand tons shipped for bunkering steamers trading in the Baltic.

10. No import duty is imposed on fuel of whatever origin in Germany. The only duty affecting the competitive power of British coal in this district is the Export Tax levied in Great Britain.

DRESDEN.

Extract from dispatch, dated Dresden, 12th January, 1904, from Mr. H. Palmié, H.B.M.'s Consul at Dresden.

On making inquiries of different important coal-dealers as well as consumers in this Consular district, I have been informed that, except for a few hundred tons of British anthracite, no British coal is imported in any considerable quantities into this Consular district.

The reason for this is, that both in our immediate neighbourhood, *i.e.*, in the Plancusche Grund near Dresden, and somewhat further in the district of Zwickau (Saxony), in the Prussian Province of Silesia, &c., there are numerous and large coal mines, furnishing enormous quantities of good coal at considerably lower prices than British coal would cost here. The coal of the Saxon mines especially is very cheap, and the Silesian coal, although 10 per cent. to 20 per cent. higher in price, is of first quality and well washed. The Bohemian State coal, which is found in the country round Teplitz, Dux, Brux, Mariaschein, Ossegg, &c., is brought here down the Elbe in big river-boats holding 500 to 600 tons each, and sold for private and industrial purposes at very low rates.

The Kingdom of Saxony produces also considerable quantities of State coal, which, however, in quality is inferior to the Bohemian, and in consequence of that is mostly made into briquettes for use in great industrial establishments, as well as in private houses.

The Director of the Dresden Municipal Gas and Electricity Works, to whom I paid a visit in order to get detailed information, told me the same thing, that British coal could not stand the competition of inland coal, owing to the enhancing of the price by the long distance from Cardiff or West Hartlepool, &c., to Hamburg and places higher up on the Elbe.

Occasionally two or three river boats have been towed to Magdeburg, and even to Riesa on the Elbe, with cargoes of British coal, which, however, have been of very inferior quality, not so good by far as Saxon or Silesian coal.

In short, I have to state again, that British coal has no market here, in consequence of the richness of our inland mines.

DÜSSELDORF.

Mr. T. R. Mulvany, H.B.M.'s Consul-General at Düsseldorf, gave evidence before the Royal Commission on Coal Supplies on Tuesday, 26th April, 1904.

(Final Report, Part X., p. 304.)

FRANKFORT-ON-MAINE.

Mr. Francis Oppenheimer, H.B.M.'s Consul-General at Frankfort-on-Maine, gave evidence before the Royal Commission on Coal Supplies on 22nd March, 1904.

(Final Report, Part X., p. 268.)

HAMBURG.

Enclosure in dispatch, dated Hamburg, 28th January, 1904, from Sir William Ward, H.B.M.'s Consul-General at Hamburg.

1. There are no statistics or other data available for obtaining this information at Hamburg. According to the best authorities no reliable estimate can be made or given of the consumption of coal, at all events for manufacturing or steam purposes. A very rough estimate might perhaps be given of the quantity used for domestic purposes exclusively in the town of Hamburg, assuming that there are about 60,000 households consuming each, on an average, five tons per annum, and therefore altogether 300,000 tons.

2. The respective importations from various sources during each of the last ten years have been as follows, viz. :—

Year.	British Coal.	German Coal.	United States of America Coal.
	Tons.	Tons.	Tons.
1894.	1,660,000	1,192,880	—
1895.	1,683,000	1,298,270	—
1896.	1,797,000	1,410,810	—
1897.	2,156,000	1,452,090	—
1898.	2,055,100	1,652,150	—
1899.	2,420,150	1,645,800	—
1900.	3,019,400	1,598,200	4,480
1901.	2,691,790	1,724,000	14,076
1902.	2,792,822	1,773,800	10,525
1903.	3,067,400	1,874,300	—

3. From Hamburg coal is taken by large barges up the river Elbe to Magdeburg and thence by river to Halle and to Leipzig; and also up the Elbe and river Havel to Berlin. No British coal is sent from Hamburg to other parts of Germany. The facilities for transportation have not changed during the past ten years.

4. The highest price was attained in 1900 when 25s. was obtained for North Country coal (good manufacturing qualities) from ships into trucks or lighters. The lowest price was touched in 1896 and 1897. The average prices for North Country coal, average quality for manufacturing purposes, during the period from 1896 to 1903 were as follows :—

		s.	d.
Jan. 1896	Average price	13	0
„ 1897	„ „	13	0
„ 1898	„ „	14	6
„ 1899	„ „	15	6
„ 1900	„ „	*21	0
„ 1901	„ „	15	6
„ 1902	„ „	15	6
„ 1903	„ „	15	6

The prices of Westphalian coal cannot be given.

5. The proportion of British coal imported into Hamburg used for bunkering British vessels can only

* Lowest (16s. 6d.) in January; highest (25s.) in autumn.

be estimated very roughly indeed; it may, according to the opinion of experienced coal importers, possibly amount to between 150,000 and 300,000 tons, if it is assumed that every British steamship visiting the Port of Hamburg takes on an average about 60 tons of coal.

6. The importations of British coal, as shown by my answer (2) have not fallen off, but increased, during the last 10 years.

7. No differential rates exist from Hamburg; Westphalian coal is imported by rail to Hamburg from Westphalia, whilst British coal is forwarded from Hamburg chiefly by river to inland parts of Germany, viz., to Berlin, Halle, Magdeburg, Leipzig, as stated in Answer 3.

It may, however, be noted under this head that Westphalian coal has the advantage of being able to be transported about 7½d. per ton cheaper from the pit's mouth to Hamburg, than British coal. This has been explained in the evidence given before the Royal Commission on Coal Supplies by Sir James Joicey, M.P. (Final Report Part X., p. 139).

8. As will be seen from Answer 2 the imports of British coal have increased considerably during the last ten years at Hamburg.

9. The export of coal and coke from Hamburg (by sea) is inconsiderable, and amounted in 1902 to 24,273 tons. This was a slight increase compared with the quantity exported in 1901 and in the preceding years. (The figures of exports for 1903 are not yet obtainable.)

10. There are at present no import duties on coal in Germany.

KÖNIGSBERG.

Extract from dispatch, dated Dantzig, 28th January, 1904, from Colonel A. M. Brookfield, H.B.M.'s Consul at Dantzig.

1. In 1903, 399,600 tons of coal and coke were imported by water and rail; of which 30,000 tons had been used for domestic purposes, the remainder for manufacturing and steam purposes.

2.

	English and Scotch coals. Tons.	Silesian coals. Tons.		English and Scotch coals. Tons.	Silesian coals. Tons.
1893	154,100	21,400	1899	315,000	29,600
1894	193,000	25,500	1900	381,200	42,800
1895	224,100	18,700	1901	297,300	23,400
1896	175,000	16,500	1902	309,000	22,700
1897	262,300	15,300	1903	377,000	22,600
1898	268,100	18,200			

3. About 120 English miles in the interior as far as our rivers are navigable for small steamers and sailing lighters, which have been employed for the transporting of the coals.

4.

	Scotch coals.		English coals.		Silesian Coals.	
	Lowest and highest prices per ton.					
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1893.	14 6	16 6	15 6	18 0	18 3	19 3
1894.	13 0	14 0	16 6	17 6	18 0	19 6
1895.	12 6	14 0	15 0	17 0	18 3	19 6
1896.	11 7½	12 6	14 1½	15 0	18 3	19 0
1897.	11 3	12 0	14 0	15 6	18 6	19 3
1898.	12 6	16 3	15 4½	19 1½	18 0	20 0
1899.	14 9	17 9	18 6	19 9	18 6	20 6
1900.	22 6	25 0	27 0	29 0	20 6	27 6
1901.	15 3	15 6	18 3	18 6	23 0	25 0
1902.	14 6	15 9	17 0	18 3	21 0	22 6
1903.	14 6	15 3	16 3	17 3	21 0	21 6

5. A very small quantity, about 1,500 to 2,000 tons.

6. The quantity, altering with the state of our industry and the severity of our winters, has gradually increased.

7. A special low tariff has been fixed for Silesian coals to different railway stations between Silesia and Königsberg, whilst all other coals have to pay the full tariff. This gives the Silesian coals a considerable advantage in the provinces; all other coals being thus dearer in proportion to the distance from Königsberg. All coals imported here consequently cannot compete with Silesian coals in our province, except within a short distance from Königsberg.

8. (*a*) Silesian coals arrive here as they have been loaded at the pit; English coals have to be handled several times before arriving at their destination; they consequently contain in general 20 per cent. screenage and more, which certainly increases their price; the greatest care ought to be taken in screening the coals before shipment.

(*b*) Silesian collieries give a liberal weight, 1 per cent. over being a usual thing. English coals, however, are delivered considerably short, 2 to 3 per cent. being no exception, which means a further increase on price. More liberal weight ought to be given.

9. No.

10. Beside the special low railway rate for Silesian coals there are no impositions affecting the competitive power of British coals.

In connection with this Report it must be borne in mind that all figures showing the import of British coal also include Pillau, as even cargoes discharged there are as a rule bound for Königsberg for the province; very few coals remain at Pillau for domestic use.

MANNHEIM.

Enclosure in dispatch, dated Mannheim, 9th February, 1904, *from Mr. P. Ladenburg, H.B.M.'s Consul at Mannheim.*

The coal consumed in South Germany, that is Baden, Würtemberg and Bavaria, is supplied almost exclusively from the Westphalian and Saar coalfields. The coal is shipped from the mines in large iron barges carrying 1,000–1,500 tons, and brought up the Rhine by powerful tugs. Since a single steamer can manage four or five barges, the freight per ton, whenever there is a fair depth of water, becomes very moderate, and much cheaper than the cost per rail. If, however, the river is low, which happens at times almost every year, the barges before ascending to the higher reaches have to transfer part of their cargoes to smaller vessels, which, of course, enhances the cost. English coal has, besides, in all cases to be transhipped at Rotterdam, which not only involves higher charges, but, unfortunately, also deterioration, and forms a serious disadvantage. The Rhine coal-barges proceed *viâ* the Main to Frankfürt; but, for the most part, to Mannheim, which is the terminus. Smaller craft can ascend to Lauterburg and Strassburg, but not regularly. At Mannheim the barges discharge into trucks and supply all South Germany, and to some extent also Elsass Lothringen and Switzerland. Bavaria takes also some quantity of Saxon and Bohemian coal, but this is of inferior quality. Concerning the total consumption of coal and coke by South Germany and the neighbouring countries there are no reliable statistics, but the quantity is somewhat large, and steadily increasing. English and Scotch coal, though not unknown, occupy, at present, no position, and are not quoted in the South German markets. Only on quite exceptional occasions is there any importation, as in the winter of 1890 – 91, when, with untoward river conditions and the miners' strike in Bohemia threatening to extend to Germany great scarcity and panic prevailed, prices rose to an extraordinary height and English and Scotch coal was imported. The quality, however, turned out so unsatisfactory that the fuel was discredited, the more so since the price was on a par with the extravagant rates paid for Saar coal that was much preferred. At present there seems little prospect of English coal finding a market in South Germany. The prices occasionally quoted appear to totally bar all possibility of business even at the cheapest rates of Rhine and sea freight.

Welsh anthracite, on the other hand, certainly has achieved a position, and is imported regularly, besides being somewhat superior in quality to German anthracite. It must, however, be regarded somewhat as a luxury, and out of the reach of the masses, since it costs very much more than ordinary coal, and is therefore consumed only in small quantities. It is about £4 to £5 per 10 tons dearer than German anthracite. Mannheim takes yearly about 20,000 tons of this Welsh description.

The total import of English coal by the Lower, Middle, and Upper Rhine harbours, including Frankfürt-on-Main, amounted—

In	1901	to	126,095 Tons.
,,	1902	,,	44,017 ,,
,,	1903	,,	42,077 ,,

To wind up, I would say that British coal, with the exception of steam and anthracite, can, in ordinary times, hardly compete in South Germany with the German coal. Save on extraordinary and exceptional occasions, it will leave no margin of profit to importers.

MEMEL.

Extract from dispatch, dated Dantzig, 28th January, 1904, *from Colonel A. M. Brookfield, H.B.M.'s Consul at Dantzig.*

1. The present consumption of coal per annum in this district is about 90,000 tons; of this about 30,000 tons are used for domestic purposes, and about 60,000 tons for manufacturing or steam purposes.

2. The sources of supply during the last ten years have been, viz.:—

(a) *From England and Scotland:—*

	Tons
1894	65,600
1895	56,300
1896	66,600
1897	66,500
1898	69,600
1899	85,300
1900	74,100
1901	65,400
1902	84,400
1903	81,000

(b) *From Westphalia, viz.:—*

	Tons
1894	2,500
1895	2,000
1896	3,900
1897	1,950
1898	12,700
1899	10,900
1900	5,610
1901	6,450
1902	6,800
1903	6,500

3. British coal penetrated only to a distance of about 120 English miles by rail and by lighters. Farther inland German coals compete keenly.

4. The average prices obtainable during the last ten years for British coal were :—

For West Hartlepool, best large	18s. to 20s.	Free trucks or lighters Memel.
,, ,, unscreened	16s. to 18s.	
Scottish large coals	16s. to 18s.	
Westphalian, best large fat large	16s. to 17s.	Free trucks or lighters Memel.
Westphalian, unscreened	15s. to 16s.	

5. It is very difficult to say what proportion of British coal has been used for bunkers of British vessels, but one can estimate the quantity used for this purpose at about 1,000 tons per annum.

6. The import of British coal has not fallen off during the last ten years, but did not experience a rise as it should have done, considering that industry has been enormously extended during the last ten years.

7. The railway rates for British coal are, in some cases, about 20 per cent. higher than the tariff for Silesian and Westphalian coals.

8. To maintain trade in British coal in this district it is necessary.

(1) That collieries ship best coal of perfect screening ;

(2) Cargoes ought to turn out as subscribed in the certificate, and the best attention should be paid to screening and weight.

9. Most of the British coal imported is again exported into the interior and to Russia—into the latter country about 5,000 tons per annum.

10. The English export duty affects unfavourably the English trade, and helps Germany to compete against British coal.

There have been no recent indications that new markets are likely to arise in this district.

The British mining industry is still maintaining its competitive power with the coalfields of other countries.

MUNICH.

Enclosure in dispatch, dated Munich, 12th March, 1904, from Mr. L. Buchmann, H.B..M.'s Consul at Munich.

NOTE.—The figures given below refer to Bavaria proper and to the Bavarian Palatinate.

1. The average consumption of coal per annum amounts to 5,581,900 tons. The Royal Bavarian Mining Department regrets that it is not possible to state the separate quantities used for domestic purposes and manufacturing or steam purposes.

2. The sources of supply, during the last ten years to the end of 1903 in the order of their relative importance, are as follows :—

Westphalia, Rhenish Prussia (the districts of the Ruhr and the Saar), Bohemia, Saxony and the United Kingdom.

3. It cannot be positively stated how much of the coal imported into Bavaria comes from the United Kingdom, but the Royal Bavarian Mining Department state that the per centage of British coal is insignificant. This small quantity enters Bavaria by way of Holland alone : 1,391 tons reached Bavaria proper in the course of ten years (1893–1903). Some British coal, however, may have been introduced by Canal Routes *via* Mannheim and Gustavsburg. On an average 1,000–2,000 tons of British coal are imported per annum into the Palatinate. Most of the British coal is used at Ludwigshafen (Palatinate) ; thus in 1902, 3,800 tons of British coal were landed there. This amount fell, in 1903, to 1,000 tons. The cause of this diminution is unknown to the Royal Bavarian Mining Department.

4. The price of British anthracite per ton, delivered into railway trucks alongside vessels in Ludwigshafen, is thirty-five to thirty-six shillings ; other coal, not British, realises twenty-seven to twenty-eight shillings.

5. No.

6. The reasons why the quantity of British coal imported into Bavaria has fallen off, are unknown to the Royal Bavarian Mining Department. The probable reason is the high freight. (*See* 7.)

7. Freight :—A. Internal Bavarian Tariff : 1 ton per kilometre (from 1–100 kilometres) 2·7 pfennigs (about 1 farthing). Over 100 kilometres, 2·2 pfennigs (about ¾ farthing). Added to this a registering fee of 60 pfennigs (7d.) per ton up to 22 kilometres, 70 pfennigs (8d.) from 23–100 kilometres, and 120 pfennigs (1s. 2d.) for more than 100 kilometres.

B. German Tariff (for coal coming from other German States), 1 ton per kilometre 2·2 pfennigs (¾ farthing) up to 350 kilometres, and 35 pfennigs (4d.) registering fee, half of the full tax. The same tariff obtains with coal imported from Holland and Belgium, and no special tariff exists for British coal.

8. The competition of German coal from the Rhenish Prussian Provinces seems to be the chief cause why the British coal trade has fallen off in Bavaria. It seems indisputable that German coal can be delivered cheaper than the British article.

9. There is no export of Bavarian coal to other countries.

10. There is nothing to add to the remarks on 8.

PILLAU.

Extract from dispatch, dated Dantzig, 28th January, 1904, from Colonel A. M. Brookfield, H.B.M.'s Consul, at Dantzig.

1. The actual consumption of coal amounts to about 215,000 tons, the description of which cannot be ascertained here.

2. All the coal consumed in this town is of British origin.

3. British coal penetrates inland about 25 German miles both by rail and craft.

4. Purchases of nearly the whole quantity of coal consumed here are effected by Königsberg coal merchants, so that prices are unknown here.

5. About 1,500 tons all British coal is shipped for the bunkers of British vessels from Pillau.

6. Official statements of the importations of British coal to this port are issued at Königsberg.

7. The railway rate on British coal chargeable for a distance of ten kilometres for ten tons is 9 marks, for every further kilometre 2 marks to 2·25 marks additional charge. The rates by craft are 1·60 mark to Konigsberg and 2·60 marks to Tilsit, all per ton. There are no differential rates on British coals.

8. The consumption of British coal increases at this port every year.

9. No export of coal takes place from Pillau.

10. Neither import duties nor other impositions affect the competitive power of British coals.

STETTIN.

Enclosure in dispatch, dated Stettin, 15th February, 1904, from Mr. Ralph Bernal, H.B.M.'s Consul at Stettin.

"No official statistics bearing on the queries are available, and the Chamber of Commerce is unable to reply to any of the questions."—(Extract from *Mr. R. Bernal's dispatch, dated Stettin, 15th February,* 1904).

1. The present consumption of British coal per annum in this Province is about 400,000 tons. The coal is principally used for manufacturing and steam purposes, only about 10,000 tons being used for domestic purposes. The consumption of German coal in the Province of Pomerania cannot be given. Coal is sent from the mines direct to the smaller towns; no record of these quantities exists in Stettin.

2. The sources of supply for the last ten years are:—
GREAT BRITAIN:—North England, Wales and Scotland.
GERMANY:—Upper Silesia.
In 1901, 4,934 tons of anthracite were imported from the United States of America for the first time, but this coal did not find a ready market in this district and in quality could not compete with Welsh anthracite.

The following Table shows the import of British and Silesian coal into Stettin during the years 1903–1894:-

Year.	British	Silesian	Year.	British	Silesian
	Tons.	Tons.		Tons.	Tons.
1903	510,988	(Unknown)	1898	451,857	331,436
1902	522,759	294,284	1897	490,028	254,403
1901	682,303	318,714	1896	479,555	188,666
1900	603,612	364,055	1895	406,996	148,322
1899	409,736	393,714	1894	268,691	258,022

3. British steam and gas coals are, to a large extent, forwarded to Berlin and neighbourhood; Welsh Anthracite has penetrated the interior as far as Saxony and Bohemia. Smalls are mainly sold at Stettin, smaller quantities going to Berlin. These coals are forwarded from Stettin in barges, carrying on an average 150 tons, to the interior (Berlin, Magdeburg, Wallwitzhafen, Dresden, &c.,) where they are loaded into trucks and forwarded to their destination.

4. Table showing highest and lowest prices obtained for British Coal:—

Year.	Steam Small.	West Hartley Large.	Durham Gas and Coking Coals.
1903	10s.	15s.	15s.
1902	10s. to 11s.	17s. to 18s.	15s. to 16s.
1901	10s.	16s.	15s.
1900	14s. to 19s.	22s. to 28s.	21s. to 26s.
1899	12s.	18s.	17s.
1898	11s. 6d.	18s.	16s.

Year.	Scotch Coals Large.	Welsh Coals Large.	Newcastle Steam Coals.
1903	16s.	—	15s. to 16s.
1902	16s. to 17s	22s. to 23s.	17s. to 18s.
1901	15s.	27s.	16s.
1900	21s. to 26s.	28s. to 34s.	22s. to 28s.
1899	17s. 6d.	22s.	18s.
1898	16s.	25s.	18s.

Table showing highest and lowest prices obtained for German (Silesian) coal:—

Year.	Large and Cobbles.	Treble Nuts.	Double Nuts.
1903	15s. to 17s.	15s. to 17s.	12s. to 15s.
1902	18s. to 19s.	18s. to 19s.	17s. to 18s.
1901	18s. to 19s.	18s. to 19s.	17s. to 18s.
1900	22s. to 28s.	22s. to 28s.	21s. to 27s.
1899	16s.	16s.	15s.
1898	15s.	15s.	14s.

Year.	Single Nuts.	Unscreened	Smalls.
1903	10s. to 13s. 6d.	15s.	12s. 6d. to 13s. 6d.
1902	16s. to 17s.	16s. 6d. to 17s. 6d.	15s. to 16s.
1901	16s. to 17s.	16s. 6d. to 17s. 6d.	15s. to 16s.
1900	19s. 6d. to 25s. 6d.	21s. to 27s.	20s. to 26s.
1899	13s. 6d.	17s.	16s.
1898	12s. 6d.	14s.	13s.

Prices for British and German coal previous to 1898 are not obtainable from reliable resources.

5. British vessels very rarely take bunker coals at this port. The vessels trading regularly to Stettin take a sufficient supply of bunkers in the United Kingdom for the return voyage; tramp steamers generally take bunkers at Portland, British coal re-shipped for the bunkers of British vessels does not exceed 1,000 tons per annum, or 0.2 per cent. of the total import.

6. The total import of British coal has fallen off since 1902, as is shown by the Table under No. 2 owing to the smaller imports of Welsh anthracite, which were as follows:—

1903 - - - 89,722 tons.
1902 - - - 84,575 ,,
1901 - - - 154,094 ,,

This class of coal is to a large extent used for domestic purposes, and the decrease of the imports is due to the very mild winters in 1902 and 1903.

7. British coal sent by rail from Stettin into the interior enjoys the same preferential rates at German and other coal forwarded from here. The amount of the latter is, however, very small. In order for German (Silesian) coal to compete successfully with British coal, the former coal forwarded from the collieries to this Province enjoys an exceptional rate. For instance, the rates from Silesia to Stettin are:—

74 (8½d.) to 77 (9d.) pfennigs per 100 kilos, when forwarding 45 tons at a time,

106 (1s.) to 110 (1s. 1d.) pfennigs per 100 kilos, when forwarding smaller quantities; whereas the ordinary rates on coal (Preferential Tariff) would be 124 (1s. 2½d.) to 127 (1s. 3d.) pfennigs per 100 kilos for the same distance. British coals pay this latter freight.

A further instance of the preferential treatment of German coal may be given:—

The freight for German coal from Königsgrube to Stettin is 7.35 marks. (7s. 5d.) per ton, the freight for British coal from Stettin to Königsgrube is 12.40 marks. (12s. 2d.) per ton.

8. The import of British coal depends to a great extent on the prices ruling for German coal; the maintenance or increase of the trade being largely a matter of prices. The lower railway freights enjoyed by German coal tends to increase its consumption, at the expense of the competing British product.

9. There is no export.

10. There are no import duties or impositions affecting the competitive power of British coals, other than the above-mentioned preferential railway rates for German coal.

All import and export rates (preferential or otherwise) to and from all stations, for all classes of goods, are published by the "Auskunftsbüreau der Kaiserlich Deutschen Reichs & der Kgl Preussischen Staats Eisenbahn-Verwaltung," Staatsbahnhof, Alexanderplatz, Berlin, C.

STUTTGART.

Enclosure in dispatch, dated Stuttgart, 12th February 1904, *from Mr. F. Rose, H.B.M.'s Consul at Stuttgart.*

"As very little British coal is exported and consumed in Würtemberg, the questions can only be answered to a limited extent."—(*Extract from Mr. Consul F. Rose's dispatch, dated Stuttgart, 12th February,* 1904.)

1. 1,700,000 tons—further details not available.

2. Principally from Rhenish Prussia and Westphalia (Ruhr and Saar districts). Small quantities of special qualities from Bohemia, Belgium, and England.

3. No information available.

4. Highest prices for English coal in 1899:—
Gas coal £11 10s. per wagon load of ten tons.
Ordinary coal £13 10s. per wagon load of ten tons.
Anthracite coal £19 per wagon load of ten tons.

German coal was sold about the same price.

5. No.

6. During the commercial depression of the last year the demand for English coal has diminished; it is also asserted that the quality in many cases is inferior to

German coal. With regard to anthracite coal, it has lost favour with the public owing to the shipment of inferior Scotch qualities.

7. There is no differential tariff for railway rates for British coal as compared with coal from other countries, as they all benefit by preferential tariffs under the heading of raw materials.

8. By appointing agents and paying more attention to the sorting of the coal before shipment.

9. No.

10. The competitive power of English coal is strongly affected by the German Coal Syndicate, which obliges its agents and salesmen to deal in and sell nothing but German coal.

SWINEMÜNDE.

Enclosure in dispatch, dated Stettin, 15th February, 1904, from Mr. Ralph Bernal, H.B.M.'s Consul at Stettin.

Report on import of British Coal viâ the Port of Swinemünde, drawn up by Mr. Vice-Consul Ed. Rose.

1. The import of British coal viâ Swinemunde during 1903 amounted to 283,658 tons, namely about 2,000 tons for domestic purposes within the town of Swinemünde and 281,658 tons for manufacturing and steam purposes at inland places. The consumption of German (Silesian) coal was 12,000 tons.

2. The sources of supply of British coal are mainly North of England and Scotland. A small quantity comes from Wales. Small quantities of German (Westphalian) coal were imported by sea to Swinemünde viâ Holland. In 1902 a cargo of American coal was imported, but only for trial purposes.

The following Table shows the import of coal to the port of Swinemünde during the last ten years:—

Year.	Imported from			
	North of England and Scotland.	Wales.	Germany.	America.
	Tons.	Tons.	Tons.	Tons
1894	373,44[illegible]	—	2,000	—
1895	428,099	—	—	—
1896	[illegible]445,13[illegible]	24,142	2,350	—
1897	426,62[illegible]	12,790	—	—
1898	[illegible]378,20[illegible]	2,378	—	—
1899	[illegible]285,137	2,541	1,900	—
1900	[illegible]268,02[illegible]	23,868	730	—
1901	336,77[illegible]	3,816	2,690	—
1902	329,64[illegible]	3,130	1,346	1,673
1903	277,14[illegible]	6,510	—	—

3. Importers at Swinemünde sell British coals mostly to Berlin and vicinity. The coal is transported by barges which carry on an average 150 tons. The railway is seldom used, and only for small quantities.

4. It is not customary to deliver British coal into railway trucks alongside of vessels, but the coals are delivered alongside by lighters or the vessel takes the coal direct from the yard.

Prices of British coal have varied very much during the last ten years. In 1898 prices reached the highest point on account of the strike in Wales and the Spanish-American War. Small coals, which are mainly imported here, were then sold at 12s. to 13s. per ton c.i.f. Swinemünde, the price being formerly only 7s. to 7s. 6d. The prices for other kinds of coals increased in the same proportion. Scotch coal, the price of which used to be 11s. to 11s. 6d. per ton c.i.f. Swinemünde, rose to 16s. 6d. to 17s. per ton in 1898. After 1898, prices for all kinds of British coals declined again. Smalls cost 9s. per ton in 1903, and at present they may be had at 8s. 6d. per ton c.i.f. Swinemünde. Prices for Scotch coals fell to 15s. 3d. and 15s. in 1903, and at present only 14s. 3d. per ton c.i.f. Swinemünde is demanded. In 1903 prime Lochgelly cost 18s. 6d. per ton free bunkers, and Silesian coals 20s. 6d. per ton free bunkers.

5. I do not remember that any British vessel took bunker coals at Swinemünde; sea-going steamers of other nations seldom take bunker coals.

6. The import of British coal always depends upon the prices. If the price is low the import increases, and *vice versa*.

7. As already mentioned under Question 3, only very small quantities of British coal are transported to inland places by railway. The railway rates charged on British coals are in accordance with Tariff III. For German coals there is a special tariff in force, and German coals coming from the collieries are charged accordingly. British coal sent inland does not enjoy the same rebate.

8. The British collieries must lower their prices.

9. There is no export.

10. British coals are free of duty in Germany; only statistical dues of ten pfennigs per 10,000 kilos are levied, which cannot affect the trade.

GREECE.

CEPHALONIA.

Extract from an Enclosure in dispatch, dated Corfu, 16th March, 1904, from Mr. Charles A. Blakeney, H.B.M's Consul at Corfu.

Report of Mr. J. Saunders, Vice-Consul at Cephalonia.

1. The present consumption of coal per annum is about 1,350 tons, of which 600 are used by the two flour mills; 400 by the Electric Light Company, which began to operate in 1900; 150 tons by the Lixuri ferry boat; 70 by the Argostoli water-works, which were completed in 1903; and 50 tons by an oil pressing machine in the country; some 80 tons only being used for manufacturing and domestic purposes.

2. Cardiff coal, which is the quality preferred, was entered as from that source by the flour mills up to the year 1897, when, owing to the rise in price, they ceased importing direct, and the two mills that are now working continue to this day to bring over this quality from the Piræus, where there is a large stock, from which they can draw any quantity as they require it. The other 750 tons, likewise Cardiff coal, are also imported from that quarter.

3. No coal is used in any other part of the Island besides the 50 tons above referred to.

5. As there were few demands for bunker coal, and those very far between, coal was, and is still, imported exclusively for local consumption, consequently there is none available for use afloat. There was, however, a larger stock at this port while the article was imported direct, and small quantities of 20 to 50 tons had, on a few occasions up to 1890, been supplied to vessels at from 22s. to 25s. or thereabouts, per ton free on board.

Coal has always been delivered on board, in lighters of from 20 to 30 tons dead weight capacity, this being the only means available at this port for shipping to vessels from the shore, as coaling cannot be effected alongside the quay.

6. The importation of British coal has not fallen off, but there is at present no probability of its increasing; present importers, however, or other speculators, would, of course, bring out coal direct from Cardiff in any quantities, could they only depend on a good and steady yearly demand for bunker coal; but no one would, otherwise, think of embarking in such a venture.

7. There are no railways or railway trucks in the Island, the coal being carried from the stores to the quay by manual labour.

9. No coal or coke is exported from this Island.

10. All foreign coal, when entered in transit, is free of the import duty, paying only a communal tax of about ¾ per cent. on the value; there is, therefore, no duty, or any other imposition affecting the competitive power of British coal.

CORFU.

Enclosure in dispatch, dated Corfu, 16th March, 1904, from Mr. C. A. Blakeney, H.B.M.'s Consul at Corfu.

1. 10,000 tons of coal—mostly used for bunkering purposes. About 1,000 tons used for local steam purposes. Coal is not used for domestic purposes here.

2. Invariably South Wales coal.

3. Nil.

4. Average price about 24s. alongside ships in lighters, except during the year 1900, when it was sold as high as 42s.

5. 1,000–1,500 tons, principally to steam yachts and ships of war.

6. Stationary.

7. No railways.

8. No competition; British coal only imported.

9. Nil.

10. There are no taxes on coal.

LAURIUM.

Enclosure in dispatch, dated Piræus, 1st February, 1904, from Hon. Reginald Walsh, H.B.M.'s Consul at Piræus.

1. The annual consumption of coal in the Laurium district is calculated at 26,000 tons of steam coal and patent fuel, and 35,000 tons of coke used exclusively for the lead ore smelting works and the railways of the different mining companies of the district.

In addition to the above, a certain quantity of lignite is also imported from the neighbourhood for the calcination of Carbonate Ores, being preferred on account of its smaller heating powers.

2. Durham, Cardiff and Swansea have been the main sources of the supply of coal to this port for the last ten years. During the great coal strikes in England and Wales some five years ago, this mining district was in part supplied with coal from Germany and Asia Minor, and imports from the latter still continue.

3. Nil.

4. The two Lead Ore Companies of Laurium contract yearly for their supply of coal, and the following is a Table of the fixed prices for the last ten years:—

Year.	Coals.	Patent fuel.	Coke.	Year.	Coals.	Patent fuel.	Coke.
	s. d.	s. d.	s. d.		s. d.	s. d.	s. d.
1894	16 0	17 0	23 0	1899	21 0	23 0	30 9
1895	17 0	17 6	24 0	1900	20 6	23 0	29 0
1896	16 0	17 0	23 0	1901	24 9	25 0	27 6
1897	18 0	19 9	27 0	1902	23 0	24 0	26 0
1898	18 6	21 0	29 0	1903	21 0	22 0	25 0

5. Nil.

6. Since the year 1900 there has been a falling off in the importation of British coals and coke. Some 15,000 tons of coal and 10,000 tons of coke are annually brought from Asia Minor to the exclusion of that amount of Durham fuel.

7. There is no transport of coals inland by rail from this port.

8. Nil.

9. Nil.

10. Nil.

PATRAS.

Enclosure in dispatch, dated Patras, 19th January, 1904, from Mr. F. B. Wood, H.B.M.'s Consul at Patras.

1. Annual consumption 10,000 to 15,000 tons, almost entirely for manufacturing and steam purposes—charcoal is universally used for domestic purposes.

2. Great Britain, and occasionally small quantities in briquettes from Belgium for the railway.

3. Not beyond the seaports.

4. Welsh steam coal—average price during the last ten years, 20s.; highest, 30s., alongside in lighters. Gas coal, 17s. to 20s. Belgian briquettes, 21s. to 22s.

5. About 500 to 1,000 tons annually are supplied to His Majesty's ships and British merchant ships.

6. No falling off in imports.

7. No British coal is transported by rail. No differential rates for British coal.

8. None.

9. None.

10. None. No import duty is levied on coal in Greece.

PIRÆUS.

Enclosure in dispatch, dated Piræus, 1st February, 1904, from Hon. Reginald Walsh, H.B.M's Consul at Piræus.

1. About 340,000 tons of coal were imported to the Piræus in 1903, of which some 2,000 tons were used for domestic, and the rest for manufacturing and steam purposes.

2.

Year.	From				Total.
	United Kingdom.	Heraclia (Asia Minor).	U.S. America.	Russia.	
	Tons.	Tons.	Tons.	Tons.	Tons.
1894	129,176	—	—	—	129,176
1895	108,442	—	—	—	108,442
1896	161,000	—	—	—	161,000
1897	169,390	—	—	—	169,390
1898	182,312	—	4,706	—	187,018
1899	234,628	—	—	—	234,628
1900	183,835	24,244	10,642	—	218,721
1901	258,691	18,121	5,118	—	281,930
1902	289,509	14,404	1,500	2,848	308,261
1903	320,000	19,271	—	—	339,271

3. Coal of any kind, except for the supply of the railway engines, is rarely met with in the interior of Greece, or at all events in such small quantities as not to be worth mentioning.

4. The following Table shows the highest and lowest prices paid for British coals in the Piræus during the last ten years. The American and Russian coals mentioned in Table 1 under Question 2 sold uniformly at 1s. per ton less than the British, which was Cardiff coal.

Year.	Price per ton f.o.b.	
	Highest.	Lowest.
	s. d.	s. d.
1894	21 6	19 6
1895	17 6	16 6
1896	17 6	16 6
1897	19 0	18 0
1898	34 6	27 6
1899	33 0	21 0
1900	38 0	28 0
1901	23 6	22 0
1902	20 0	19 0
1903	20 0	19 0

5. British vessels do not coal at Piræus.

6. As will be seen in Table 1, under Question 2, the importation of British coal steadily increases.

7. Nil.

8. Nil.

9. There is no exportation proper of coal from this port. A certain quantity is transhipped here for some of the Turkish Islands in the Archipelago and for other Greek ports, amounting in all to about 6,000 tons annually.

10. There is no duty on coal in Greece. Manufactories and works of different kinds requiring coal are continually increasing in the country, and as there is no local supply of coal except a small quantity of lignite, no impositions are placed on the importation of British or other coals.

SYRA.

Enclosure in dispatch, dated Syra, 19th February, 1904, from Mr. W. H. Cottrell, H.B.M.'s Consul at Syra.

1. Present consumption - - - - - - 100,000 tons per annum
Manufacturing purposes - - - - - - 2,000 tons ,, ,,
Steamship purposes - - - - - - 98,000 tons ,, ,,

2.

Year.	From United Kingdom.	From Turkey.	From Greece.
	Tons.	Tons.	Tons.
1894	41,317	—	—
1895	25,795	—	—
1896	54,892	—	—
1897	45,260	—	—
1898	61,385	—	—
1899	57,480	—	—
1900	53,387	2,910	600
1901	102,965	1,603	—
1902	101,286	3,039	—
1903	100,031	8,726	—

3. Coal movements only in the port.

4. No railways of any kind.

5. About 8 per cent.

6. No falling off.

7. No railways.

8. The importance of Syra as a coaling station is likely to be maintained, owing to the rapid development in Greek shipping of this district. The demand for British coal is steady. Import largely increased during the last three years, *vide* No. 2. Competition amongst local dealers is favourable to the British coal trade, prices and profits being redured to a minimum; active measures are employed by them to persuade foreign shipowners to call here for British coals. For the present nothing can be done.

9. There are no coal mines in this country. The only exports are from the local depôts of British coals, about 5,000 tons per annum, slightly increasing. They are sent to Dardanelles, Crete, Cyprus, Volo and Chalkis.

10. The import of coal is free from any duty. A municipal tax of 45 leptas (about 3d.) per ton is charged on coals consumed for manufacturing purposes. It is suggested that the working and output of the coal mines in Asiatic Turkey should be watched, as there is a probability of keen competition in that quarter, given active operations, proper control and loading facilities. This Turkish coal has found a small market here in the shape of a local steamship company importing it for special use of their steamers in the coasting trade. The quality is reported to be inferior to British coal, but it is cheaper by about 3s. per ton, and since 1900 the import here has risen from 2,910 tons to 8,726 tons in 1903, a significant fact that it is gaining ground. Many Italian and Austrian steamers which formerly called here for bunkering with British coals now get their supplies at Zougouldak, in Asia Minor, notwithstanding the efforts of the local dealers to secure renewals of former contracts for British coals. If ruling prices of coals in England can be kept normal the introduction of American coals is not likely, but if through strikes or other causes at home prices run high, then further attempts will probably be made by American firms.

VOLO.

Enclosure in dispatch, dated Volo, 19th January, 1904, from Mr. A. A. C. Merlin, H.B.M.'s Consul at Volo.

1. About 12,000 tons of coal and 2,000 tons of patent fuel are imported annually for manufacturing and steam purposes. None imported for domestic use, wood and charcoal being employed for all such purposes.

2. Practically only British coal and patent fuel has been imported during the past 10 years, mostly coming from Cardiff and Newcastle.

3. British coal is, and has been, obtainable during the past 10 years at all centres throughout Thessaly, being easily forwarded from Volo into the interior of the province by rail.

4. Cardiff and Newcastle coal delivered on shore.
Lowest price in past 10 years about 18s. per ton.
Highest ,, ,, ,, ,, 40s. ,,

5. No imported British coal is afterwards shipped for the bunkers of British vessels.

6. The amount of British coal imported into Thessaly has steadily augmented, keeping pace with increased local requirements.

7. The railway rates for coal transport into the interior of Thessaly are as follows:—

Volo to	Velestino	per ton	2s. 4d.	about.
,,	Larissa	,,	5s. 6d.	,,
..	Pharsala	,,	4s. 6d.	,,
..	Karditza	,,	5s. 0d.	,,
..	Trikala	,,	5s. 6d.	,,
,,	Kalabaka	,,	6s. 0d.	,,

8. Present position of British coal trade satisfactory.

9. No exports of coal or coke from Thessaly.

10. No import duties on any coal, coke, patent fuel, &c. All such is, however, liable to pay municipal dues amounting to about 2 per cent. on value.

ZANTE.

Extract from an Enclosure in dispatch, dated Corfu, 16th March, 1904, from Mr. Charles A. Blakeney, H.B.M.'s Consul at Corfu.

Report of Mr. C. H. Sargin, Acting Vice-Consul at Zante.

1. The present consumption of coal per annum at Zante is from 100 to 300 tons. The amount depends on bunker demand. Very little used for manufacturing purposes.

2. The sources of supply these last ten years have been all from England.

3. The coal does not go inland.

4. The highest and lowest prices for local consumption has been from 20s. to 22s., and for coal delivered in lighters alongside has been from 22s. to 23s. or 23s. 6d. Coals usually from Cardiff.

5. Very small quantities are sometimes taken by British steamers from time to time.

6. The quantity of British coal imported cannot be fixed, as 2,000 tons may last 3 or 5 years. Coke is not used, and if any small amount is needed the Patras Gas Works can amply supply the demand.

7. No other charges on any coal (British or foreign), but some small municipal and harbour dues when for local use, free for ships.

8. Trade has no chance of increasing, but what there is, is exclusively British.

9. No exports.

10. Duties for all, on one scale. Nothing affects British trade.

ZEA.

Enclosure in dispatch, dated Syra, 19th February, 1904, from Mr. W. H. Cottrell, H.B.M.'s Consul at Syra.

1. The present consumption of coal per annum in Zea amounts to 20,000 tons about, used exclusively for re-delivery to steamers.

2. The above coals are solely imported from Cardiff.

3. Coal movements only in the port.

4. From 40s. to 19s. Only Welsh coal has been sold at Zea, and always in lighters.

5. All the coal imported at Zea is used for bunkering purposes, and about 80 per cent. is supplied to British ships.

6. The coal business has not been in existence at Zea over five years. "The Zea Coaling Company" having been established only in 1899.

7. No railways.

8. The Zea Coaling Company expect that the coal business will greatly increase as soon as the present depression in shipping subsides.

9. None.

10. Only British coal imported. No competition.

ITALY.

ANCONA.

Enclosure in dispatch, dated Florence, 27th February, 1904, from Major W. P. Chapman, H.B.M.'s Consul-General at Florence.

Report of Mr. E. A. Kane, Vice Consul at Ancona.

1. The present consumption of coal per annum in this Vice-Consular District, which includes the ports of Ancona and Ravenna, the roadsteads of Giulianova, Francavilla, and Ortona, is the following, viz. :—

For steam and manufacturing purposes - - - - - 282,558 tons.
For domestic purposes - - - - - - - - - Nil.

2. The sources of supply for the last ten years were the following: Great Britain, Austria and Hungary, America, Germany, as shewn under.

Imports at Ancona.

From	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain - -	202,785	136,502	116,946	119,886	155,454	186,715	148,562	191,498	209,868	213,500
Austria - - -	1,358	942	60	448	1,997	2,596	9,105	4,254	2,824	2,500
Germany - - -	—	—	—	—	3,087	2,015	—	300	11,244	9,400
U. S. of America - -	—	—	—	—	—	—	15,297	—	—	—
France - - -	48	758	—	—	—	—	—	—	—	—
Totals - -	204,191	138,202	117,006	120,334	160,538	191,326	172,964	196,052	223,936	225,400

Imports at Ravenna.

From	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain - -	7,370	4,860	7,000	16,681	20,250	20,099	19,706	18,979	19,750	22,750
Austria - - -	4,200	3,500	3,555	8,340	10,129	9,370	9,570	8,650	8,750	8,300
Totals - - -	11,570	8,360	10,555	25,021	30,379	29,469	29,276	27,629	28,500	31,050

Imports at Giulianova.

From	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain - -	—	1,954	4,107	5,337	3,840	8,134	7,669	6,721	7,183	13,748
Austria - - -	—	122	—	91	624	515	300	100	143	452
Corfu (Greece) - -	—	—	120	385	402	—	—	—	—	—
TOTALS - - -	—	2,076	4,227	5,813	4,866	8,649	7,969	6,821	7,326	14,200

Imports at Francavilla.

From	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain - -	2,020	1,950	2,500	2,050	2,100	1,867	2,350	2,067	2,000	2,350

Imports at Ortona.

From	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain - -	7,435	9,188	6,810	8,567	2,093	5,000	2,104	1,500	5,366	2,492
Austria - - -	3,219	2,065	2,102	1,349	3,563	3,071	3,074	6,737	4,717	7,066
TOTALS - - -	10,654	11,253	8,912	9,916	5,656	8,071	5,178	8,237	10,083	9,558

3. British Coal penetrated inland as far as Foligno, Perugia, Aquila, Chieti, Sulmona, all being carried by railway.

4. The prices of British and Austrian Coals during the the last ten years, delivered into railway trucks alongside vessels, were the following:—

Welsh Coal.

	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Highest - - -	23 6	24 0	23 6	24 6	25 0	27 0	38 0	29 6	26 0	24 0
Lowest - - -	22 0	23 0	22 0	23 0	23 6	25 0	36 6	28 0	25 0	23 6

North Country Coals (Steam and Gas).

	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Highest - - -	22 0	22 6	22 0	22 6	23 0	25 0	36 0	23 6	22 6	24 0
Lowest - - -	21 0	21 6	21 0	21 0	21 6	22 6	33 6	21 6	21 0	22 0

Austrian Coal (Dalmatian).

	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Highest - - -	20 0	20 0	20 0	19 0	20 0	22 0	31 0	20 0	19 0	20 0
Lowest - - -	19 0	19 0	19 0	18 0	19 0	21 0	27 0	19 0	18 0	19 0

5. No coal is shipped here for the bunkers of British vessels, as the majority of them arrive here direct from the United Kingdom, and have always sufficient coal on board to proceed to the homeward loading ports.

6. The quantity of British coal imported in this Consular district is always on the increase. Only in the year 1900, owing to the strike in Wales, coal was imported from the United States of America to the extent of 15,000 tons; also Foundry Coke and Small Steam Coal (washed) from Westphalia (Germany) were imported in the years 1902 and 1903, amounting to 11,244 tons, and 9,400 tons respectively; but the principal source of supply will always be Great Britain.

7. The Railway rate charged on British, as well as on any other quality of coal, is 53 centimes per ton, per kilometre (or about 8d. per ton per English mile.) There are no differential rates whatsoever, a small reduction being granted over 100 kilometres (about 63 miles).

8. I am of opinion that the abolition of the Export Tax would further enhance the consumption of British coal in competition with that of other countries.

9. There are no exports of Coal or Coke from this Consular district, and in fact none at all from Italy.

10. No Import Duty is imposed on coals. Only a so-called "Tax for Statistic," amounting to 10 centimes per ton is levied.

BRINDISI.

Enclosure in dispatch, dated Brindisi, 15th January, 1904, from Mr. S. G. Cocoto, H.B.M.'s Consul at Brindisi.

1. BRINDISI.

Importation of coal during the years 1894–1903.

Years.	Great Britain.	America.	Austria.	Germany.	Totals.
1894	142,601	—	1,231	—	143,382
1895	119,508	—	2,752	—	122,260
1896	85,872	—	969	—	86,841
1897	132,161	—	1,414	—	133,575
1898	111,731	—	1,861	2,231	115,823
1899	145,688	—	—	—	145,688
1900	106,226	20,218	174	—	126,618
1901	132,651	—	254	—	132,905
1902	117,663	—	596	—	118,259
1903	120,110	—	544	2,155	122,809
Totals	1,214,211		9,795		1,248,160

2. TARANTO:—The only importers at Taranto are the Dockyard and the Gasworks, which received annually as follows:—

Year.	Dockyard.	Gasworks.	Totals.
1894	7,450	3,050	10,500
1895	12,037	3,860	15,897
1896	18,603	3,270	21,873
1897	31,376	3,520	34,896
1898	—	4,735	4,735
1899	5,347	2,875	8,222
1900	3,046	2,172	5,218
1901	12,979	3,354	16,333
1902	—	4,433	4,433
1903	11,555	4,295	15,850
Totals	102,393	35,564	137,957

3. GALLIPOLI.—Gallipoli imports no coal, being served by railway from Brindisi.

	Great Britain. Cardiff Coal.	Other Countries.	Totals.
Coal imports to Brindisi in ten years, 1894–1903	1,214,211	34,399	1,248,610
Coal imports to Taranto in ten years, 1894–1903	137,957	—	137,957
Totals of ten years -	1,352,168	34,399	1,386,567
Mean of ten years -	135,216	3,400	138,656

Of the 137,957 tons imported to Taranto, 35,564 was Newcastle coal for gas purposes.

2. As is shown in preceding Tables, importations have been, and still continue to be almost entirely from Great Britain; the importations from America and from Germany took place during times of strikes in England.

The small quantity of Dalmatian coal shown is used in mills in this vicinity.

The quality of the German coal was not considered good; on the other hand, the American was found to be excellent.

3. Cardiff coal only is used in this province as a general rule, except by the Taranto Gasworks. Coal is sent from Brindisi as far as Foggia on the Bologna line of railway, San Severo and Potenza in Central Southern Italy, and Catanzaro on the Southern coast.

4. The selling prices for coal loaded in railway trucks have been as follows :—

	s.	d.		s.	d.
1894 - -	17	3	1899 - -	26	3
1895 - -	17	10	1900 - -	32	3
1896 - -	23	0	1901 - -	24	0
1897 - -	24	3	1902 - -	28	0
1898 - -	27	3	1903 - -	22	0

5. Of the total imports 35 per cent. is reshipped as "bunkers"; 60 per cent. is consumed by the railways, half of which quantity is imported as small coal and manufactured here into patent fuel; 5 per cent. is used by mills, smithies, etc.

6. The quantity of coal imported is fairly stationary; no new railway lines have been opened during the past ten years, and no industry needing large coal supplies has been developed during that period.

7. No preferential rates are accorded to coal. Railways charge slightly lower rates per ton per kilometre for long distances than for short—thus a ton of coal is taxed for conveyance for short distances at lire 0·0515, viz., up to 100 kilometres, lire 5·15; the rate then gradually decreases, 200 kilometres costing lire 8·24; 300 kilometres, lire 11·33; 400 kilometres, lire 14·42; 500 kilometres, lire 16·99; and 600 kilometres, lire 19·56.

8. and 9. The answer is negative.

10. The only tax levied by Customs on imported coal is that called the "Statistical Tax" of 10 centimes per ton, which is levied only on coal declared for consumption in the interior; coal declared as intended to be supplied to either Italian or foreign steamers is exempt from this tax.

CATANIA.

Enclosure in dispatch, dated Palermo, 1st February, 1904, from Mr. Sydney J. A. Churchill, H.B.M.'s Consul at Palermo.

Report of Mr. A. W. Elford, Vice-Consul at Catania.

1. 100,495 tons–for steam and furnace purposes.

2. United Kingdom.

3. To all parts of this district, principally by railway.

4. Statistics not available.

5. During 1903, only 65 tons were reshipped for the bunkers of British vessels.

6. Imports of British coals increasing.

7. About four-fifths of a penny per mile; no differential rates.

8. By keeping c.f.i. prices low so as to ward off threatened American and German competition.

9. None.

10. Condition of coal trade with the United Kingdom is satisfactory, but there is great competition amongst local importers.

CIVITA VECCHIA.

Enclosure in dispatch, dated Rome, 27th January, 1904, from Mr. C. C. Morgan, H. B. M.'s Consul at Rome.

1. About 25,000 tons of coal (say one-seventh of the total quantity imported) are consumed every year within my district, and exclusively used for manufacturing and steam purposes. For domestic purposes, only charcoal and wood are used.

2. Direct importation from the United Kingdom has always been the only source of supply, and 175,000 tons of coal per annum have been imported during the last ten years.

3. Most of the coal imported each year to this port is carried, either by land or by water, up the Tiber to Rome (about 50 miles inland), and about 10,000 tons penetrate as far inland as Terni (120 miles from Civita Vecchia). No railway or other facilities for transportation have been introduced during the last ten years.

4. There is no coal market at Civita Vecchia, and the coal supplied is contracted for annually by the importers. The average prices for British coal have been from 40 to 30 liras a ton (£1 12s. to £1 4s.) during the last ten years, and no other coals but British have been imported. Coal is not delivered in railway trucks alongside vessels, but discharged in lighters, which are tugged in shore, and their freights are transferred to carts, which convey the coal to the railway station. The carts are unloaded at the station, and finally the coal is placed on railway trucks.

5. No, none.

6. The importation of coal is subject to fluctuations from year to year without, however, any tendency towards a permanent decline or increase. A falling-off noticeable during a year is generally amply covered by an increase in the following one.

7. The railway rates are about 4·30 liras (say 3s. 4d.) per ton for complete trucks to Rome, and they are the same for all coals, British or otherwise.

8. The British coal trade in my district is not capable of increase, as it is limited to the requirements of industrial concerns, and these only are the importers.

9. No coal or coke is exported from my district.

10. The import duties on coal do not seem to affect the British coal trade at this port, and no efforts have ever been made to compete against it. Coal has always been the chief import at Civita Vecchia, and notwithstanding the many drawbacks in this port and the cumbersome primitive and costly system of discharging vessels, the trade has been maintained, and if it has not revived, neither has it fallen off.

Enclosure in dispatch from Mr. C. C. Morgan, dated Rome, 7th January, 1905.

1. The quantity of coal imported at this port during the year 1904 is 200,000 tons, of which quantity only about 35,000 tons have been used within my district, the remaining quantity having been forwarded for inland purposes. The quantity used in my district hae been disposed of for steam and manufacturing purposes, viz: for the patent fuel, cement, and alum manufactories, railway, gas works and lime kilns, charcoal and wood only being used for domestic purposes.

2. The sources of supply are from the United Kingdom direct and the quantities imported during the last ten years average from 170,000 to 180,000 tons yearly.

3. The distance inland to which coals have penetrated is about 120 miles, viz.: from Civita Vecchia to Terni, to which place they have been carried by railway.

4. The highest price obtained for British coal delivered into railway trucks is 42·00 lire per ton and the lowest 20·00

lire, but, as there are no facilities at this port for discharging coal from vessels direct into railway trucks, the extra expenses for landing and cartage to the railway trucks are included in the said prices.

5. No coal is shipped at this port for the bunkers of British vessels, as such vessels arrive here direct from the United Kingdom, and are therefore well supplied for the return voyage.

6. The quantity of British coals imported can be considered stationary. The importation of steam and gas coal would have been considerably increased, but for the use of water power, which is now resorted to for generating electricity for industrial and illuminating purposes.

7. The railway rate chargeable on coal is 5·35 lire per 100 kilometers, and there are no differential rates for British coal compared with native coal or other coals.

8. British coal is exclusively used for industrial requirements in my district, and there appears to be no probability that such coal will be ousted by other coal.

9. No coal or coke is exported from my district.

10. Coals are free from import duty, but pay a statistical tax of ten centimes, which however does not effect British coal more than other foreign coal.

ELBA.

Enclosure in dispatch, dated Florence, 27th February, 1904, from Major W. P. Chapman, H.B.M.'s Consul-General at Florence.

Report of Mr. C. Tonietti, Vice-Consul at Elba.

1. Domestic purposes - - - - Nil
   Steam ,, - - - - 6,000 tons.
   For making coke - - - - 100,000 tons.

2. Up to the end of the year 1901 all the coals used in Elba came from England; in 1902 the importation of coals commenced to increase, reaching :—

   24,286 tons from Germany,
   19,514 ,, ,, England.

In the year 1903 the coal was all imported from England in tons 106,000.

3. Nil.

4. Sixteen shillings alongside the blast furnace pier at Portoferraio or alongside the vessel in the harbour.

5. None.

6. It is increasing owing to the erection of the two blast furances in Portoferraio for which the Elba Company is making its own coke on the spot; no German coking coal has been used in the year 1903, but the proposed extension by the said Company of its works, by the erection of steel works and two other blast furnaces of large output, leads one to believe that German coal is going to be introduced again.

7. Nil.

8. The British coal trade may be maintained and increased if the following chemical conditions of the coal are strictly kept, viz :—

On Cardiff Coking Coal	Ashes less than 10 per cent.	
	Sulphur ,, 1 ,, ,,	
	Phosphorus no more than 0·03 per cent.	
	Volatile - - -	17 to 20 ,,
On Durham Coking Coal.	Ashes - - -	7½ per cent.
	Sulphur - - -	0·7 ,,
	Phosphorus - -	0·03 ,,
	Volatile - - -	24 ,,

If not, the Westphalian coking coal would be preferred: they are trying to eliminate the difficulty which there is now in the transportation in order to have that coal in Portoferraio fresh from the collieries.

9. No coal, but some coke; and it will increase after the building of a new blast furnace at Fallonica, where Portoferraio coke will be shipped for the use of that new furnace.

GENOA.

Enclosure in dispatch, dated Genoa, 2nd February, 1904, from Mr. Wm. Keene, H. B. M.'s Consul-General at Genoa.

1. The present arrivals of coal at Genoa amount to nearly 2½ million tons. Rather more than two-thirds are consumed for manufacturing purposes in Liguria, Piedmont, and Lombardy; but Lombardy gets a portion of its supply from Venice, as do Liguria and Piedmont a portion of theirs from Savona and Spezia. The consumption for domestic purposes is quite beneath notice.

2. See annexed Table I. obtained from private sources and believed to be approximately correct.

3. All through Italy by rail.

4. See Table II. Other foreign qualities unimportant and unrecorded.

5. Yes—Unrecorded.

6. Table I. shows that imports have steadily increased.

7. Railway rates from this port are: 5 centimes (½d.) per ton per kilometre up to 100 kilometres; 3 centimes per ton per kilometre, from 101 to 400 kilometres. No native coal or preferential rates.

8. I have heard it said that British coal is less carefully screened than of yore. There seems to be no fear of competition at present, so long as prices and freights are low and quality is good.

9. No exports.

10. There is no import duty, as coal is at present necessary for growing Italian industries. Great attention is being turned, however, to the water-power resources of Italy, and the development of what is already significantly styled "white coal" may some day seriously diminish the demand for coal.

TABLE I.

Coal arrivals at Genoa from 1894 *to* 1903 *inclusive, with Ports of Shipment.*

Years.	Cardiff, Penarth, Barry, P. Talbot.	Newport.	Swansea.	Newcastle, Shields, Blyth, W. Hartlepool, Sunderland.	Hull, Grimsby, Middlesbrough.	Liverpool, Manchester, Garston.	Glasgow, Leith, Granton.	Methil, Burntisland (Fifeshire).	Troon, Ardrossan, Ayr (Ayrshire).	North American Ports.	Various (unspecified).	Sydney.	Totals.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1894	1,131,516			596,788	26,130	22,253	73,890	—	—	—	4,719	—	1,855,296
1895	1,092,711			566,090	19,634	11,098	97,828	—	—	—	4,709	—	1,792,070
1896	1,172,931			535,494	11,516	24,902	107,145	—	—	—	1,040	—	1,853,028
1897	1,272,154	During these years arrivals from Newport and Swansea are included in those from Cardiff.		620,717	10,953	39,065	137,768	—	—	—	2,156	—	2,082,813
1898	933,354			739,909	29,931	89,324	283,623	—	—	—	583	—	2,076,731
1899	1,394,540			641,857	28,340	63,386	211,930	—	—	—	337	—	2,340,390
1900	1,368,417			659,425	16,052	57,138	243,218	—	—	—	—	—	2,344,250
1901	1,000,732	229,194	75,880	583,316	28,886	41,458	123,554	27,094	16,823	74,185	4,469	8,462	2,214,063
1902	1,111,945	246,314	77,714	630,966	21,685	21,967	148,215	50,980	4,815	73,477	25,812	14,459	2,418,349
1903	1,156,674	258,345	81,231	650,619	29,218	32,500	137,647	63,022	7,955	26,058	43,363	7,388	2,493,970

TABLE II.

Highest and lowest prices for British coal on truck at Genoa during the last ten years 1894–1903 *inclusive.*

Years.	Cardiff.	Newport.	Newcastle.		Scotland.	
			Steam.	Gas.	Hamilton Ell „ Splint	Fifeshire. Ayrshire.
	Lire.	Lire.	Lire.	Lire.	Lire.	Lire.
1894.	23 to 25	21·50 to 23·50	22 to 31	18 to 23		
1895.	22 „ 25	20·50 „ 23·50	19 „ 22·50	18 „ 19		
1896.	22·25 „ 26	22 „ 24·50	18·50 „ 20	17 „ 22		
1897.	23 „ 28	21·50 „ 26·50	21·50 „ 25	19·50 „ 22		
1898.	26 „ 43	25 „ 42	26 „ 35	21 „ 29	No special price lists for these qualities of coal during the years 1894–1901 inclusive.	
1899.	29·50 „ 44	28·25 „ 43	28 „ 34	22 „ 34·75		
1900.	37 „ 50	36 „ 49	—	31 „ 39		
1901.	35·50 „ 39	34·50 „ 38	—	22 „ 26		
1902.	27 „ 30	26 „ 28·50	23 „ 25·50	21·50 „ 23·50	20·50 to 23	19 „ 21·50
1903.	26·50 „ 30	25·25 „ 28·50	22·50 „ 25	20·50 „ 24	21 „ 24·50	19·50 „ 23

LEGHORN.

Enclosure in dispatch, dated Florence, 27th February, 1904, *from Major W. P. Chapman, H.B.M.'s Consul-General at Florence.*

Report of Mr. M. Carmichael, Vice-Consul at Leghorn.

1. The average annual import of coal into Leghorn has recently been about 360,000 tons, of which, speaking roughly, about one half is taken by the Tuscan Gas Companies and the two railway lines (the Mediterranean and the Adriatic). The remainder represents the real coal trade of the place, and is used almost exclusively for manufacturing or steam purposes. The quantity used for domestic purposes is insignificant, as wood and charcoal fires still prevail in Tuscany.

The following Table shows the quantity of coal and coke (including patent fuel) imported during the ten years 1893–1902 :—

Year.	Quantity.	Proportion from United Kingdom.
	Tons.	Per cent.
1893.	217,169	—
1894.	270,524	—
1895.	248,594	—
1896.	254,616	—
1897.	290,199	99
1898.	319.314	93
1899.	323,075	99
1900.	364,134	94
1901.	365,815	97
1902.	352,431	96

2. From the above Table it will be seen that the quantity coming from non-British sources is insignificant. I do not possess statistics of the exact proportion for the years 1893–1896, but the average from foreign sources would be about one per cent. If the above figures could be subjected to analysis it would show that the proportion as regards coal is practically negligible. For these statistics include coke from Germany, and patent fuel from Belgium. It, moreover, sometimes happens that a steamer with superfluous bunker coal will sell 20 or 30 tons of it when prices rule high, or it is desired to obtain greater cargo carrying capacity. These small quantities are included in the statistics of total import, the country of origin being taken from the steamer's last port of call, and thus a small quantity of British coal figures in the Customs returns as a foreign import. In 1900 a certain quantity of United States coal was imported, competition being possible owing to the high rates of freight and high prices of coal prevailing in the United Kingdom. The Anchor Line steamers, regular traders between the United States and Italy, occasionally bring over a few hundred tons of American coal, for the sake of filling their vessels. Westphalian coke is beginning to find some favour, as pointed out in my last Annual Report (No. 3029), but neither German, French nor Belgian coal is imported here as a regular thing.

3. British coal is in use right throughout the peninsula ; but from Leghorn is usually not sent further than to the towns of Emilia and Umbria.

4. There is no market price of coal in Leghorn. The price at which coal is sold is a matter of private arrangement and bargaining. I am therefore unable to furnish general information in reply to this question, but a local merchant has been so kind as to favour me with his own results in the last four years, which are as follows :—

	1900.	1901.	1902.	1903.
	s. d. s. d.	s. d. s. d.	s. d. s. d.	s. d. s. d.
Cardiff - -	32 0 to 36 0	26 5 to 32 0	23 2 to 25 7	22 10 to 24 10
Gas Coal - -	29 7 „ 32 10	21 7 „ 28 10	19 0 „ 22 5	18 2 „ 20 0
Scotch Coal -	28 0 „ 31 2	20 5 „ 24 10	17 7 „ 20 0	17 7 „ 19 7

These figures are per ton on truck at Leghorn.

5. About 2,000 tons of the coal imported into Leghorn is afterwards shipped for the bunkers of British and foreign vessels.

6. As the Table given under reply to Question No. 1 shows, there has been no falling off in the import of British coal into Leghorn during the last ten years, but rather a substantial increase.

7. Railway rates are the same for all coal whatever the country of origin, but there is no fixed unit per ton per mile. The rate varies according to distance, starting with five centimes per ton per kilometre for short distances, which rate diminishes for long distances and varies as it goes over different lines.

8. There being no serious competitor it is difficult to make any suggestion for the increase of the British coal trade in this district; but I would venture to call attention to the alleged complaints of shortage fully explained in my Annual Report on the Trade and Commerce of Leghorn of 1902 (No. 3029).

9. There are no exports of coal or coke from this district.

10. There is no import duty on coal in Italy, but by the Customs law of the 25th July, 1896, a penny per ton is leviable on coal, coke and patent fuel for what is termed *diritto di Statistica.*

MESSINA.

Enclosure in dispatch, dated Palermo, 28th January, 1904, *from Mr. Sydney J. A. Churchill, H.B.M.'s Consul at Palermo.*

Report of Mr. C. Lascelles, Vice-Consul at Messina.

1. The quantity of coal imported into Messina during the year 1903 amounted to 91,050 tons and was distributed as follows:—

	Tons.
Domestic purposes - - - -	20
Manufacturing purposes - - -	24,123
Steam (1) Bunkers - - - -	44,617
,, (2) Railways and Tramways -	10,398
In deposit - - - - - - -	11,892
TOTAL - - - -	91,050

2. A Table of the sources of the supply of coal during the last ten years is annexed. (Table No. 1.)

3. The above-mentioned quantity of coal was used in the district of Messina for manufacturing purposes, railways and tramways and for shipping in bunkers. A small quantity was, however, shipped to Calabria (Italy).

4. The average price of coal per ton in Messina is shown in the annexed Table. (Table No. 2.)

5. About one-half of the total amount of British coal imported annually into Messina is shipped for bunkers of ships of all nations. It is, however, impossible to state with accuracy the actual amount shipped on British ships. It may be estimated that about one-third of the total amount shipped into bunkers is taken by British vessels.

6. There has been no very appreciable falling off in the quantity of British coal imported during the last ten years. The slight decrease in the amount imported during the years 1898–1900 is attributed chiefly to the state of trade occasioned by the South African War.

7. The railway rates chargeable on British coal in this district amount to about 4d. per ton per mile. There are no differential rates for British coal as compared with other imported coals.

8. ——

9. There are no exports of coal or coke from the district of Messina.

10. There is a tax of 1d. per ton on all coal imported into Messina.

TABLE No. 1.

Return of Coal Imported at Messina during the ten years 1894–1903.

Year.	Quantity.			Total.		Grand Total.
	Welsh.	North Country.	Foreign.	British Coal.	Foreign Coal.	
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1894	60,479	25,898	5,916	86,377	5,916	92,293
1895	58,512	22,540	—	81,052	—	81,052
1896	56,191	31,862	19	88,053	19	88,072
1897	54,602	32,532	41	87,134	41	87,175
1898	47,720	19,337	3,306	67,057	3,306	70,363
1899	49,865	34,914	409	84,779	409	85,188
1900	47,120	18,737	1,685	65,857	9,685	67,542
1901	61,982	30,621	7,312	92,603	7,312	99,915
1902	75,371	23,346	7,225	98,717	7,225	105,942
1903	62,335	22,415	6,300	84,750	6,300	91,050
	574,177	262,202	32,213	836,379	32,213	868,592

TABLE No. 2.

Table showing the Average Price of Coal per Ton in Messina during the Ten Years 1894–1903.

Year.	Welsh. Price. Lowest.	Welsh. Price. Highest.	North Country. Price. Lowest.	North Country. Price. Highest.	Other Countries.
	£ s. d.	£ s. d.	£ s. d.	£ s. d.	
1894	0 18 5	1 1 0	0 16 6	0 19 0	The coal imported from other countries is consumed at Messina by the importers themselves, consequently the price cannot be ascertained.
1895	0 16 0	0 17 6	0 14 0	0 15 0	
1896	0 16 0	0 17 0	0 14 0	0 15 6	
1897	0 16 8	0 19 0	0 15 6	0 17 0	
1898	1 1 4	1 7 0	0 19 6	1 5 0	
1899	1 2 0	1 5 0	1 1 0	1 3 0	
1900	1 5 9	1 8 0	1 3 6	1 6 0	
1901	1 5 9	1 8 6	1 3 6	1 6 0	
1902	1 0 0	1 2 0	0 18 6	0 19 0	
1903	0 18 10	1 0 6	0 18 0	0 19 0	

MILAN.

Enclosure in dispatch, dated Milan, 12th February, 1904, *from Mr. J. H. Towsey, H.B.M.'s Consul at Milan.*

1. No statistical data regarding the consumption of coal in this district are obtainable, and therefore it is very difficult to give any but approximate figures thereof. According to a chart, the latest obtainable, received from the Inspectorate of Italian Railways, it appears that 563,847 tons of coal arrived at Milan and its neighbourhood in 1898 from Genoa, and from information procured at the Italian Chamber of Commerce it seems that 500,000 tons of coal reached the town of Milan in 1901. It is reckoned that nearly a similar amount reached other places in this province, making about 1,000,000 tons consumed in the province of Milan. Several coal merchants who have been consulted are of the same opinion, and some state that it is roughly estimated that almost half the quantity of coal landed at Genoa is forwarded into Lombardy as far as Milan. The port of Venice likewise sends supplies to the eastern province of Lombardy, say Mantova, Cremona, and Brescia. Nearly all the coal received is for industrial purposes. Coal also comes from Savona. There is an increasing demand for anthracite for domestic purposes and for gas installations.

2. With the exception of about 70,000 tons of German Coke, which arrives by rail overland viâ Switzerland, all the coal that arrives in this district is British, being mostly from Cardiff, but a good proportion is represented by gas coal from the Tyne. The sources of supply during the last ten years have principally been British. The quantity of American coal imported is so insignificant that it does not compete with British coal.

3 The chart above referred to, of the coal carried on the Italian Railways in 1898, shows how far inland coal is forwarded from the ports of discharge.

4. No information can be given under this head, this not being a seaport.

5. None of the coal imported into this district appears to be sent away for shipment for the bunkers of British vessels.

6. Notwithstanding the great development in the use of electricity for industrial purposes and illumination which has taken place in this district, there has been no falling off in the importation of coal, but on the contrary a gradual increase is noticeable.

7. The railway rates, per ton, chargeable on coal in this district, on the principal lines connecting Milan and Brescia with Genoa and Venice, are :—

Genoa to Milan, Lire	715 = 5s. 8d.	
Venice to Milan, ,,	105 = 8s. 9d.	Exchange at Lire
Genoa to Brescia, ,,	965 = 7s. 8d.	2520 per £1.
Venice to Brescia, ,,	855 = 6s. 9d.	

Consequently Milan and the places to the westward of it draw their supplies from Genoa, while places to the eastward draw their supplies from Venice. There are no differential rates for British Coal as compared with other imported coal.

8. It is possible that if reductions were made in the Italian railway rates there would be an increase in the demand and greater facilities for sale ; as matters stand, the cost of bringing coal from Genoa to Milan is practically the same as that of carrying it from Great Britain to Genoa. It is also stated that merchants here consider the difficulties arising from " short " delivery at the ports of discharge an impediment to a greater development in the trade.

9. There are no exports of coal from this district.

10. Beyond a nominal " statistical " tax on coal imports at the frontier and ports of discharges there are no Customs duties ; and no town dues are imposed at Milan.

German exporters of coal to Italy are entitled to a rebate in the railway rates on the German lines as far as the Italian frontier, but not in Italy, if the coal carried exceeds a given quantity.

NAPLES.

Enclosure in dispatch, dated Naples, 10th February, 1904, from Mr. E. Neville-Rolfe, H.B.M.'s Consul-General at Naples.

1. For domestic purposes, 100 tons. For manufacturing or steam purposes, 100,000 tons.

2. Supply almost exclusively from Great Britain; a few cargoes of American coal.

3. The provinces of Castellammare, Salerno, Basilicata, Benevento and Abruzzi.

4. The following is the approximate price of Welsh coal at Naples during the last ten years. It is only quite lately that trucks have been able to come alongside the coal wharf.

Year.	Cost.	Freight.	Year.	Cost.	Freight.
	s. d. s. d.	s. d. s. d.		s. d. s. d.	s. d. s. d.
1894	8 0 to 8 6	7 0 to 7 3	1899	14 0 to 25 0	7 0
1895	8 0	7 0 „ 7 6	1900	15 0 „ 14 6	6 6 to 7 6
1896	8 0 to 7 9	6 0 „ 6 3	1901	14 0 „ 14 6	8 0 „ 7 6
1897	10 0 „ 11 0	8 0 „ 8 6	1902	13 6	5 6 „ 7 0
1898	15 0 „ 20 0	7 0 „ 7 6	1903	13 0	4 9 „ 5 0

I am informed that the following are representative prices for the different classes of coal:—

	£ s. d.
Cardiff	1 2 11
Newcastle	1 1 8
Scottish	1 0 0
Coke	1 10 5

5. 300,000 tons, or about one-third.

6. The import has increased.

7. Tenpence to ten shillings, according to distance. There are no differential rates.

8. The greatly increased use of water-power for generating electric force will eventually affect the coal market, but in any case British coal has practically been a monopoly here.

9. No exports.

10. There are no duties.

PALERMO.

Enclosure in dispatches, dated Palermo, 13th and 28th January, 1904, from Mr. Sidney J. A. Churchill, H.B.M.'s Consul at Palermo.

1. Available statistics are for 1902, vide pages 5, 6, 11 and 12 of Report on the Trade and Commerce of Sicily for 1902)—Imports into Sicily in 1902: 430,788 tons, of which a little over 11,000 tons were not from the United Kingdom.

2. The United Kingdom has supplied Sicily with coals hitherto.

3. Inland Coals are used by the Railways, Mines, and for heating boilers on fruit farms, &c.

4. Statistics not available.

5. Very little bunkering is done at Palermo; Messina will be applied to for statistics as to the bunkering there. The amount of coals imported during 1903 at Palermo amounted to 160,182 tons, as compared with 147,630 tons during the year 1902; of this amount, 118,384 tons were carried in thirty-nine British bottoms, one of which was a hired Admiralty collier.

6. Importation of British coal is increasing.

7. No differential rates.

8. Vide Answer to No. 6.

9. None.

10. The great competition amongst mine-owners at home, and amongst coal dealers locally, has made the trade a very difficult one. At Palermo, during 1903, coals were being sold below British prices, reliance evidently being placed on short deliveries. The best Palermo firm, that of Beltrani, has ceased to trade in coal; the rest are all looking after themselves first and always—a policy not favourable to coal-shippers who have not been paid before delivery.

ROME.

Enclosure in dispatch, dated Rome, 27th January, 1904, from Mr. Charles C. Morgan, H.B.M.'s Consul at Rome.

1. The present consumption of coal per annum in Rome is about 62,000 tons (Return for 1902. Statistics for 1903 are not yet available.) No distinction is made in the official Returns as to quantities used for domestic, manufacturing, or steam purposes.

2. The United Kingdom has been, up to the present, the only source of supply.

3. British coal has penetrated inland from Rome to the centres of consumption, proportionately to the development of the railway system in my district. There have been no special facilities granted by the railway companies for the transportation of coal.

4. Rome not being a sea-port, for Answer No. 4 vide Report of Vice-Consul at Civita Vecchia.

5 Ditto.

6. The quantity of British coal or coke imported into Rome has maintained its normal average during the last ten years.

7. The Railway rates chargeable on British coal in my district are 3s. 4d. per ton for complete trucks, and are applicable to native as well as to imported coals generally.

8. I doubt whether the importation of British coal in my district, and of all other coals generally, is likely to increase. It is a fact that there is an industrial revival in my Consular District, as well as in other parts of Italy; but during late times Italian manufacturers have studied the question of utilizing the waterfalls for the purpose of obtaining the necessary electric power required by them for their manufactures, and nothing short of a substantial decline in the price of British coal and the reduction of shipping freights, is ever likely to encourage consumers to prefer British coal to electricity.

9. No coal or coke is exported from my district.

10. There is no import duty in Italy on coal, and there has not been any visible competition of other nations with regard to coal imported into this country. An attempt was made in 1900 and 1901 by the United States of America to send coal to Italy; but I find in the statistics for 1902 (the last available) that the quantity exported by the United States to Italy fell to one-half of that of the previous two years.

SAVONA.

Enclosure in dispatch, dated Genoa, 2nd February, 1904, from Mr. W. Keene, H.B.M.'s Consul-General at Genoa.

Report of Mr. O. Ponzone, Vice-Consul at Savona.

1. The present consumption of coal per annum in the Savona district is reckoned at from 180,000 to 200,000 tons, nearly all for manufacturing or steam purposes, the quantity for domestic use being a mere trifle.

2. Our coal importations have been almost exclusively from Great Britain, only during the last two or three years some five or six thousand tons were imported from the United States (this being a special expensive gas coal called cannel) and during the last two years about 5,000 tons of Festuck coal from Germany.

3. British coals from this port are forwarded all through Piedmont, and also to Lombardy as far as Milan.

4. The prices of British coals per ton delivered alongside into railway trucks during the last ten years have been as follows:

		s.	d.		s.	d.			s.	d.		s.	d.			s.	d.		s.	d.
In the year	1894—For	Welsh	18	0	to	18	6;	for	Newcastle	16	0	to	16	6;	for	Scotch	16	0	to	16	6.
,,	1895—	,,	17	0	,,	17	6;	,,		13	0	,,	14	0;	,,		13	0	,,	14	0.
,,	1896—	,,	16	0	,,	17	0;	,,		13	0	,,	14	0;	,,		13	0	,,	14	0.
,,	1897—	,,	17	0	,,	18	0;	,,		14	0	,,	15	0;	,,		14	0	,,	15	0.
,,	1898—	,,	19	0	,,	22	0;	,,		16	0	,,	20	0;	,,		16	0	,,	20	0.
,,	1899—	,,	19	6	,,	24	6;	,,		19	0	,,	21	6;	,,		18	6	,,	21	0.
,,	1900—	,,	35	0	,,	36	0;	,,		27	6	,,	28	6;	,,		27	6	,,	28	6.
,,	1901—	,,	23	6	,,	27	0;	,,		18	6	,,	23	3;	,,		16	6	,,	20	0.
,,	1902—	,,	22	0	,,	22	6;	,,		18	0	,,	18	6;	,,		16	0	,,	16	6.
,,	1903—	,,	20	9	,,	21	6;	,,		16	6	,,	17	6;	,,		14	9	,,	15	9.

As to the German Festuck coal the price is calculated at from 1s. 6d. to 1s. 9d. per ton less than the best Welsh coal.

5. In very small proportions, viz., a few thousand tons.

6. Importation of British coal is keeping on increasing, this having doubled itself in the last twenty years.

7. The railway rates are the same on all kind of coals.

8. By keeping prices down to compete with German coals, by shipping coal well worked, properly screened and free from stones and dirt.

9. No exportation of coals, but only of coke in small quantities.

10. The only import duty on all coals from abroad is 1d. per ton, called the Custom Statistic Duty. British coals, previous to the year 1900, were imported in better condition than they are now, the Scotch coals being the only one better cared for at present. In order to compete with the German coals, which are found very clean and more carefully prepared before shipping, it is especially necessary to keep the British coals up to their former standard in quality. Of these Festuck coals I may add that during the last two years another 13,000 tons of small coal have come to this port from Amsterdam, which have invariably found their way to Signor Raggio's patent fuel works at Novi Ligure.

SICILY, *see* PALERMO, MESSINA AND CATANIA.

SPEZIA.

Enclosure in dispatch, dated Genoa, 2nd February, 1904, from Mr. W. Keene, H.B.M.'s Consul-General at Genoa.

Report of Mr. E. M. de Carston, Vice-Consul at Spezia.

1. Quantity imported:—

	Tons.
During 1894	132,880
„ 1895	115,239
„ 1896	73,576
„ 1897	166,299
„ 1898	99,009
„ 1899	138,636
„ 1900	97,375
„ 1901	217,000
„ 1902	237,653
„ 1903	258,097

(All used for steam or manufacturing purposes).

2. During 1899 Belgium and France supplied 5,346 tons; in 1900 and 1901, 4,000 and 18,528 tons respectively came from the United States, and in the latter year about 8,500 tons came from other Italian ports. In 1902 Belgium supplied 8,824 tons, and during 1903 Germany supplied 10,419 tons and Belgium 5,929 tons. With these exceptions, all the supplies came from the United Kingdom.

3. Parma, Reggio (Emilia), Modena and Brescia; beyond this radius the consuming centres come within the zone of other distributing ports, viz.: Genoa, Leghorn and Venice. The railway rates for carriage of coal are: from Spezia to Parma 6·10 lire, to Reggio 7·30 lire, to Modena 8 lire, and to Brescia 8·95 lire per ton.

4. No statistics are available, a fairly accurate average price, however, during the period named would be: for gas coal, 17s. and for steam coal 24s. per ton, with the exception of the year 1900, when gas coals ruled about 40s. and steam coal was quoted at 45s. per ton.

5. No bunker coals are shipped here by British vessels.

6. The importation of British coal at this port is steadily on the increase.

7. Rate to Parma 6·10 lire, to Reggio Emilia 7·30 lire, to Modena 8 lire, and to Brescia 8·95 lire per ton. Very little coal goes through Spezia to the latter town, as Brescia is also supplied through Venice from whence the Railway rates are lower. No differential rates.

8. The importation of British coal in this district will increase automatically with the industrial progress of this part of Italy, until some other means of generating power are exploited.

9. There are no exports of coal or coke from this district.

10. No import duty is imposed on coal in Italy, either British or otherwise, as it is considered a prime necessity, and any duty imposed thereon would only enhance its cost to the consumer, there being no supplies in the country available.

At present the facilities for discharging or loading cargo at this port are strictly limited; however, large schemes are on foot for harbour improvements, to which the Government is pledged to contribute to the extent of 80 per cent. of the cost; when these are carried out, owners will find it more to their advantage to send their vessels here, in which case all imports here will rapidly increase, as likewise exports. With increased facilities, and consequently economy, Spezia should, and doubtless will, become a more frequented port of entry—coal will naturally follow the general increase *pari passu*.

VENICE.

Enclosure in dispatch, dated Venice, 25th February, 1904, from Mr. Edward de Zuccato, H.B.M.'s Consul at Venice.

1. The average consumption of coal in this district is about 600,000 tons: for domestic purposes about 25,000 tons, for manufacturing, draining and steam purposes about 575,000 tons a year.

2. The sources of supply during the last ten years were England and Scotland, and in a very small proportion Germany and the United States. In the last three or four years, however, preference was exclusively given to British coal.

3. British coal has penetrated into all the Venetian, and some of the Lombard, Provinces up to Brescia. Coal can be discharged into railway trucks alongside vessels and into lighters for river transportation.

4. It was not possible to ascertain the highest and lowest prices obtained for British coal delivered into trucks, as local firms are in the habit of mixing different qualities, and prices consequently are variable, but, as only British coal is imported and as the average profit of the merchant is about eightpence per ton, the highest and lowest prices of the coal might be ascertained in England in accordance with the original prices of the coal.

5. The average proportion of British coal imported into Venice and afterwards shipped for the bunkers of British vessels is about 3,000 tons, and for the bunkers of foreign ships about 25,000 tons a year.

6. The quantity of British coal and coke imported into this district has been continually increasing, but it is feared there may be a falling off in the future, when the water sources, which are plentiful in this district, will be utilised for the production of electrical power, to be then transmitted over large and distant areas.

7. The railway rates chargeable on coal are different according to the various Companies, but the average rate may be computed at about six centimes per ton per kilometre. There are no differential rates.

8. I am unable to make any suggestion on the subject.

9. There are no exports of coal or coke from this district.

10. There is only an imposition of ten centimes per ton, which is levied by the Government authorities, under the denomination of statistical charge (*diritti di Statistica*).

AMSTERDAM AND ROTTERDAM.

Mr. H. Turing (H.B.M.'s Consul at Rotterdam), with whom Mr. W. C. Robinson (H.B.M.'s Consul at Amsterdam), made a joint Report, gave evidence before the Royal Commission on Coal Supplies, on 16th February, 1904. (Final Report, Part X., p. 255.)

BATAVIA.

Enclosure in dispatch, dated Batavia, 10th June, 1904, from Mr. Duncan D. Fraser, H.B.M.'s Consul at Batavia.

1. Calculated on the basis of the imports and production of coal for the last three years, the average annual consumption may be estimated at about 350,000 tons. Of this quantity practically nothing is used for domestic purposes.

2. Statement No. 1, attached, shews the quantity of coal imported into Netherlands India during the last ten years, together with the names of the countries from which it has been imported. Statement No. 2 shews the production of the Government Ombilien Coalfields in Sumatra for the same period.

3. British coal is seldom used for manufacturing purposes in the interior of Jaka, although the facilities for transportation are good owing to the railway which runs through the island. The reason for this is that sugar factories consume principally cane refuse supplemented by wood, while wood, which is abundant and cheap, is used for most other manufacturing purposes.

4. I enclose a statement shewing, as fas as I have been able to ascertain them, the highest and lowest prices paid during the last ten years for Cardiff, Australian, and Japanese coals respectively.

5. Only a very small proportion of the British coal imported is used for bunkering British vessels, as these generally use either Australian or Japanese coals owing to their comparative cheapness.

6. From enclosed Statement No. 1, it will be observed that since the year 1894, when over 100,000 tons of British coal was imported, the imports have fluctuated a good deal, varying between 40,000 and 70,000 tons, of which the largest proportion has been used by the Dutch Navy and the State Railway, and a small quantity for bunkering merchant steamers. For bunkering purposes British coal has largely been replaced by Australian, which has been ousted in turn to a considerable extent by the cheaper Japanese coals.

7. The railway rates chargeable on coal are as follows :—
Per Netherlands Railway Company, 8d. per wagon load of 7·94 tons, per kilometre (about 1,094 yards).
Per State Railway, 1s. 6d. per wagon load of 7·94 tons, per kilometre.
No differential rates prevail for British or other kinds.

8. British coal will probably always be in demand to a certain extent for naval and railway requirements, and for other purposes for which first quality coal is a necessity, but as long as other kinds, such as Australian, Japanese, and Indian coals, can be laid down so much cheaper, it is more likely that the outlet for British coal in Netherlands India will diminish in the future rather than increase.

9. No. The production of the Government Ombilien Coalfields is only used by the Government railways and the local steamship lines, and is sold to steamers requiring bunker coal at the ports of Padang and Batavia.

10. No import duty is levied on coals imported into Netherlands India.

No. 1.—*Statement showing the Imports of Coal into Netherlands India*, 1894–1903.

Name of Country from which exported.	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Holland	1,795	5,050	3,765	2,213	2,940	1,213	5,957	11,877	6,030	1,536
England	123,444	61,306	82,243	69,026	43,537	56,346	42,149	53,413	38,559	62,216
Australia	6,082	18,604	35,306	45,380	60,240	64,566	31,278	37,474	48,524	24,226
Japan	—	—	4,500	—	—	—	19,500	76,679	46,748	95,405
Singapore	1,110	400	120	189	728	500	7,449	919	2,489	461
Penang	2	113	180	1,444	48	49	51	17	9	275
Belgium	—	2,150	—	—	—	—	—	—	—	—
China	—	1,060	—	—	—	—	—	—	—	—
Hongkong	—	—	—	45	200	1,145	650	—	480	103
America	—	—	—	—	—	1,847	1,719	—	—	—
Malacca	—	—	—	—	—	—	104	69	—	—
Saigon	—	—	—	—	—	—	60	—	—	—
Germany	—	—	—	—	—	—	—	—	215	5
British India	—	—	—	—	—	—	—	3,691	5,293	2,297
British North Borneo	—	—	—	—	—	—	—	—	—	50
Totals	132,433	88,683	126,114	118,297	107,693	125,666	103,917	184,139	148,347	186,574

No. 2.—*Statement shewing the Production of the Government Ombilien Coal Fields in Sumatra, and the prices realised Per Ton at Padang and Tandjong Priok, during years* 1894–1903.

Year.	Production in Tons.	Price per ton in Ship's Bunkers at	
		Padang.	Tandjong Priok.
		s. d.	s. d.
1894	72,451	25 0	24 2
1895	107,942	25 0	22 0
1896	126,264	23 4	20 10
1897	142,850	23 4	20 10
1898	149,434	26 8	25 4
1899	181,325	26 8	25 4
1900	196,206	23 4	27 0
1901	193,074	23 4	27 0
1902	180,702	23 4	27 0
1903	201,311	23 4	23 2

Statement shewing the highest and lowest prices obtained for cargoes of Cardiff, Australian and Japanese coals during the years 1894–1903, *delivered on the coal wharf at Tandjong Priok.*

Year.	Cardiff.		Australian.		Japanese.	
	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1894.	—	24 3	23 6	22 0	—	—
1895.	26 6	21 6	—	22 0	—	—
1896.	—	26 6	—	22 0	—	—
1897.	—	32 0	26 6	25 6	—	—
1898.	30 0	28 0	—	32 0	—	—
1899.	—	32 6	—	23 6	—	—
1900.	—	41 0	—	29 6	—	23 6
1901.	36 0	35 6	—	26 6	24 4	22 3
1902.	—	29 6	—	19 0	20 2	17 8
1903.	—	27 6	—	—	—	17 8

Statement shewing the Imports of Coals on account of the Netherlands Indian Government, during the years 1894–1903.

Year.	Holland.	England.	Singapore.	Australia.	Japan.	Totals.
1894	—	—	1,330	—	—	1,330
1895	—	—	1,031	—	—	1,031
1896	2,097	2,700	678	—	—	5,475
1897	500	2,297	—	—	—	2,797
1898	—	13,956	—	—	—	13,956
1899	—	4.038	—	—	—	4,038
1900	—	920	—	36,086	—	37,006
1901	—	5,611	—	29,456	2,950	38,027
1902	—	—	50	31,048	—	31,098
1903	735	964	11	540	—	2,250

CURAÇOA.

Enclosure in dispatch, dated Curaçoa, 19th February, 1904, from Mr. Jacob Jesurun, H.B.M.'s Consul at Curaçoa.

1. At present the consumption of coal per annum in the Colony of Curaçoa does not exceed 3,000 tons.

This quantity includes about 560 tons United States coal, shipped from this port to the Republic of San Domingo, and about 1,000 tons principally British coal which have been shipped last year to Aruba, an island forming part of this Colony, and for the use of the Aruba Gold Concession Company, Limited. This is a British Company which expects to use about 5,000 tons of British coals annually. About 400 tons have already been imported by them direct from Cardiff, and another cargo has been ordered. At the same island the Aruba Phosphate Company has been importing annually about 250 tons from Cardiff for their locomotive and tugboat. The balance, 1,500 tons, is consumed at this island by the Curaçoa Electric Plant, Curaçoa Waterworks, and for opening and closing of the bridge across the harbour, and by blacksmiths. None is used for cooking or heating purposes. The quantity of coals taken by steamships at this port is calculated to be about 30,000 tons annually.

2. Before the Spanish-American War, 1898, almost only British coal was imported here from Cardiff.

Since the Red " D " line of steamships, a United States Company, and the Royal Dutch West Indian Mail Service (a Dutch company), have been plying between this island and New York, U.S.A., these companies have been importing regularly coals from the United States of America for the use of their steamships. The Dutch man-of-war stationed at this island, and most of the foreign men-of-war calling at this port, as also the steamships of the following companies—Italian, " La Veloce " ; Spanish, " Compania Trasatlantica " ; Austrian, " The Austra Americana "—take at this port all the coal they may require, and they most often prefer the United States coal on account of cheapness. For this reason, the Pocahontas, New River, and other United States coals have been imported and sold since 1901 in very large quantities.

3. Not applicable here. Coal is not required inland. Coal is used only in or very near the town, and is handled with great facilities in lighters alongside the wharfs.

4. I am unable to give quotations any further back than 1901, when British coal has been sold at from 40s. to 32s. per ton delivered alongside the steamers, in lighters when anchored in the Schottegat Bay, and over the ship's rail when they are moored at the coal wharfs. Under similar circumstances the United States coal was sold at from 28s. to 24s. Due to the existing competition between the only two importers of coal, the prices for British and United States coals are arbitrary.

5. With the exception of an occasional British man-of-war, or yacht, no other British steamers calling here ever take any coal for their bunkers.

6. Although the quantity of British coals imported into this Colony has not actually fallen off, nevertheless the imports of the same have not increased in proportion to the demand for fuel, as would have been the case were it not for the very much larger quantities of other coals imported from the United States of America, due to their cheaper cost price, and also on account of freight, which is about 3s. to 4s. cheaper from the United States than from England.

7. There is no railway in the Colony, nor any native coal.

8. The importation of coal in this island depends on the number of foreign men-of-war which visit the port. By lowering the cost price of British coal at home, and its freight to this port, the trade, which is daily becoming more important on account of the several lines of steamships and men-of-war coaling at this port, will undoubtedly increase.

9. There is no export of coal or coke from this colony.

10. Import duty 3 per cent. ad valorem is the same for all coals imported into this island. All vessels engaged in carrying cargoes of coals to this island are exempt from the payment of light and beacon dues. Only the cheaper price and lower rate of transportation of the United States coals are causes which affect the competitive power of British coals on this market.

SURINAM.

Enclosure in dispatch, dated Paramaribo, 9th April, 1904, from Mr. J. R. W. Pigott, H.B.M.'s Consul at Surinam.

1. Present annual consumption about 3,200 tons.

Steam purposes - - -	3,200 tons.
Domestic - - - -	Nil.
Manufacturing - - -	Nil, practically.

2. Principal source of supply during the last ten years :—United Kingdom (Cardiff), except in 1900, when, owing to the coal strike, a large proportion was imported from the United States.

3. Coal is only used on the coast. Facilities for transport to interior, nil.

4. Have been unable to ascertain the prices in the local market during the last ten years, the importers being unable, or unwilling, to give any information on the subject. The heads of the firm are at present in Europe.

5. No coal has been supplied during the last six years, nor, so far as I can ascertain, during the four previous years, for bunkers of British vessels. During the years 1902–3 the U.S. cruiser, " Detroit," and the U.S. despatch vessel, " Gloucester," coaled here.

6. The quantity of coal imported during the last ten years has varied very little with regard to the United Kingdom, except in the year 1900, when, as stated above, the greater part was imported from the United States.

7. No coal is transported by rail, and no native coal is produced.

8. The inclination is in favour of British coal, in fact the Colonial Navigation Department stipulate that the coal supplied should be Welsh steam coal.

9. No coal has as yet been found in the colony, consequently none has been exported.

10. No duty is chargeable on coal or coke, nor are there any impositions affecting British or other coal. A railway is now in course of construction by the Government, which will certainly cause some increase in the quantity of coal imported, but I have not yet been able to ascertain to what extent wood will be used for fuel ; the supply of wood along the line is abundant.

PORTUGAL.

BEIRA.

Enclosure in dispatch, dated Beira, 8th March, 1904, from Mr. R. C. F. Greville, H.B.M.'s Consul at Beira.

1. About 4,000 tons per annum, which is used exclusively for steam purposes.

2. Cardiff and Natal in the proportions respectively of about five-eighths and three-eighths.

3. As far as the Rhodesian border for railway purposes.

4. Highest price £4 10s. for British, and lowest price about £3 for Natal. Records of the prices in each year as required are not obtainable.

5. Practically none.

6. Import is slightly increasing.

7. On the Beira and Mashonaland Railway, coal is accepted (in quantities of over 5 tons) as 3rd class freight, which to Umtali, costs 5s. 6d. per 100 lbs.

8. It is unlikely that imports will further increase, see answer to No. 10.

9. There are no exports at present.

10. Should the quality of the product of the Wankie coalfields fulfil expectation, the present imports of British coal will hardly be maintained.

CAPE VERDE ISLANDS, ST. VINCENT.

[Enclosure in dispatch, dated St. Vincent, Cape Verde, 3rd February, 1904, from Mr. H. Langdon, H.B.M.'s Acting Consul at the Cape Verde Islands.

1. In this small place there is only a small consumption in the houses occupied by British subjects and a few well-to-do Portuguese ; say about 20 tons per month. The natives use wood and there are no manufactories. The quantity imported is about 250,000 tons annually.

2. South Wales.

3. Does not apply.

4. South Wales coals have been placed alongside steamers and men-of-war in lighters during the past ten years, at prices ranging from 21s. per ton free alongside to 38s. 3d. per ton free alongside. During the strike in South Wales a few years ago a little North Country coal was sold at about the same price as Welsh coal has been sold.

5. Most of the coals imported here are afterwards shipped for the bunkers of British steamers, but a fair amount is also supplied to German, Italian, and steamers of other nationalities.

6. The quantity of coals imported has not fallen off. No coke imported.

7. Does not apply.

8. This is simply a coaling port and depends entirely on the state of trade ; as, if steamers are getting good freights, they will naturally take more cargo and less bunkers at their loading ports, and consequently require more bunkers en route.

9. No exports other than the coals supplied as bunkers.

10. There is a heavy impost of about 1s. 2d. per ton imposed by the Portuguese Government upon all the coals brought into the port, and although most of the coals never come ashore, they have also to pay the said 1s. 2d. per ton. If the Portuguese Government could be prevailed upon to take off this duty, the merchants would of course be able to sell the coals correspondingly cheaper and the trade would be improved.

CHINDE.

Enclosure in dispatch dated Zomba, 8th April, 1904, from Sir Alfred Sharpe, K.C.M.G., C.B., H.B.M.'s High Commissioner and Consul-General for Central Africa.

"At the present date, practically no coal is imported into British Central Africa, and none is used, although some coalfields of some considerable extent exist in some parts of the Protectorate."—*Extract from Sir Alfred Sharpe's dispatch.*

Report of Mr. S. H. Fletcher, Vice-Consul at Chinde.

1. About 50 tons of best Welsh coal is imported by the African Lakes Corporation, Limited, for furnace uses only. No other firm imports coal.

2. Supply from England.

3. No inland trade for coal.

4. See answers 1 and 3.

5. No British vessel coals in Chinde.

6. Coke for Naval Department Fort Johnston imported in small quantities for furnace purposes only.

7. No railways yet.

8. See answer No. 3.

9. None.

10. No import duties for coal brought through British Concession.

LISBON.

Enclosure in dispatch dated Lisbon, 18th January, 1904, from Mr. F. H. Cowper, I.S.O., H.B.M.'s Consul at Lisbon.

1. The present consumption of coal per annum within the Consular District of Lisbon is 450,000 tons—that is, taking the consumption of last year as a basis; but the consumption has been gradually increasing year by year for the last twenty years. Practically no coal is used for domestic purposes, the whole is consumed for manufacturing and steam purposes.

2. The United Kingdom has been the only source of supply during the last ten years with the exception of 15,000 tons imported from the United States on trial in 1902, but the trial was a failure and it was discontinued.

3. British coal has penetrated inland as far as railway transport permit, east and south as far as the Spanish Frontier, viz.; to Extremoz, Evora, the Beja District, but principally to the large manufacturing town of Covilhã.

4. The information required under this question could only be obtained from the coal importers themselves; but they declined to give it on the ground that it would reveal their business secrets. I have, however, ascertained that the highest and the lowest prices obtained for British coal delivered alongside the vessels, duty paid, was respectively 16s. 3d. and 24s. during the last ten years.

5. Last year 132,000 tons of British coal imported was afterwards shipped for bunkers, viz.; 47,000 tons for the bunkers of British vessels, and 85,000 tons for the bunkers of foreign vessels, including Portuguese lines.

6. The quantity of British coal imported into this Consular District has not fallen off, but has steadily increased during the past ten years in consequence of the increasing local consumption for manufacturing, railroad and steam purposes. The importations comprise Welsh and North Country Coal.

7. The railway rates chargeable on British coal in this district are:—

From 1 to 100 Kilometres 12 reis per Metric Ton per Kilometre.

From 101 to 200 Kilometres 11 reis per Metric Ton per Kilometre.

From 201 to 300 Kilometres 9 reis per Metric Ton per Kilometre.

From 301 and over Kilometres 6 reis per Metric Ton per Kilometre.

There are no differential rates compared with native or other imported coal.

8. The only suggestion I can make, as to how the British coal trade of this Consular District can be maintained in view of any possible competition, is for coal proprietors in the United Kingdom to send periodically to Lisbon, as the distributing centre of the coal trade of Southern Portugal, active, intelligent and expert representatives to deal directly with the local consumers and importers, to bid for orders, to receive orders, and to execute orders. There is no other way of maintaining or developing the trade as long as British coal can compete in price and quality with foreign coal. This is a self-evident fact and applies equally to every branch and class of trade; and the coal exporters of the United Kingdom, if they wish to maintain their present hold on this market, should be alert and moving, because it is probable that the colliers of Germany and Belgium will, in the near future, make strenuous efforts to place their outputs on the Lisbon market.

9. None of the coal imported from the United Kingdom is re-exported, but the Lisbon Gas Company, who import annually about 90,000 tons, export a few hundred tons of the coke made from British coal to Spain and the Portuguese Colonies. There are no collieries in this Consular District; but although there is a rather important mine of Anthracite coal being worked at Saõ Pedro da Cova, near Oporto, the coal from this mine is not used in Southern Portugal.

10. There is no other information that I know of bearing upon this question which would be of value to the Commission. The import duty on coal is 345 reis per ton, at present, and on coke 400 reis. These duties are imposed on all coal, irrespective of the country of origin, and cannot therefore affect the competitive power of British coal.

LOANDA.

For Portuguese Possessions in West Africa, South of Gulf of Guinea.

Enclosure in dispatch, dated Loanda, 10th March, 1904, from Mr. W. S. R. Brock, H.B.M.'s Acting Consul at Loanda.

1. Loanda is the only place in Angola where coal is imported or used.

The consumption is about 21,000 tons per annum, of which 10,000 to 11,000 are for the use of the steamers of the Empreza Nacional de Navegação, a Lisbon Company.

3,000 to 4,000 tons are taken by the railway, 6,000 to 7,000 tons by the Loanda Coaling and Lighterage Company (of London).

Coal is not used for domestic purposes, and the quantity employed in manufactures is infinitesimal.

2. All coal imported during the ten years ended December 31st, 1903, was British, except one cargo of Pocahontas (American), during the strike in England in 1898.

3. The use of coal is unknown in the interior, except on the railway.

4. Nearly all coal imported during the last ten years for bunkering has come from Cardiff.

The railway coal is from Newport. Prices for Cardiff coal free alongside steamers have varied during the last ten years from 40s. to 55s.

One or two cargoes of Lancashire coal have been tried, but no one wants this quality.

5. British vessels, mostly men-of-war, take about one-third of the coal imported by the Loanda Coaling and Lighterage Company.

6. The total quantity of British coal imported into Loanda has not fallen off.

7. Railway rates on British or any other kind of coal are 360 reis per ton per kilometre, equal to 2s. 0¾d. per mile at exchange 5,600 per £.

Excepting for its own consumption, the railway does not carry more than five or six tons a year.

8. British coal trade here can only be improved by Loanda becoming a more important place.

9. There are no exports of coal or coke.

10. At present there are no import duties on coal. The 1s. Export Tax has not affected the consumption. Purchasers are willing to pay the difference in price between South Wales and any other kind of British coal. Foreign coal will not sell here at all.

MADEIRA.

Enclosure in dispatch, dated Madeira, 13th February, 1904, from Mr. J. Bowring Spence, H.B.M.'s Consul at Madeira.

1. About 240,000 tons.

2. South Wales. Scarcely any north-country and no foreign.

3. None used inland.

4. ——

5. Practically all.

6. Importation yearly increasing (with increase of shipping).

7. No railways carrying coals.

8. Could be increased by more vessels making this a coaling port.

9. No.

10. ——

MOZAMBIQUE.

Enclosure in dispatch, dated Beira, 8th March, 1904, from Mr. R. C. F. Greville, H.B.M.'s Consul at Beira.

Report of Mr. C. E. Chambers, Vice-Consul at Mozambique.

1. 2,000 tons. Practically the whole is consumed by ships. No domestic consumption and no manufacturing steam plant in Mozambique.

2. Cardiff.

3. No coal consumed on the mainland and no facilities for transportation.

4. No railways. Highest price, trimmed into bunkers, 80s., lowest 56s.

5. About 75 per cent.

6. No falling off.

7. No railway.

8. The consumption of coal depends upon the shipping, as ships are practically the only consumers.

9. No.

10. An import duty of 1½ per cent. ad valorem on all coal imported.
Coal is landed into barges and stored.

OPORTO.

Enclosure in dispatch, dated Oporto, 31st January, 1904, from Mr. Honorius Grant, H.B.M.'s Consul at Oporto.

1. The present consumption is composed of the quantity which is imported (Answer 2) plus the native coal from a mine in the neighbourhood of Oporto; exact figures of the latter are not published, but the output from the mine is 8,000 to 9,000 tons per annum.

There are no data for estimating the proportion used for domestic purposes: according to persons engaged in the trade it can be placed at about 13,000 tons per annum (including coke).

2. British and native, and isolated importations from Germany, Belgium, France, Spain, and the United States. The figures for the last ten years are as follows (Oporto):—

Year.	Great Britain.*	Germany.	Belgium.	France.	Spain.	United States.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
1894	126,219	306	—	1	1,740	—
1895	111,997	324	—	—	2,250	—
1896	127,936	—	—	—	—	—
1897	130,595	—	—	—	—	—
1898	135,106	—	—	980	—	—
1899	134,128	300	—	—	—	1
1900	149,206	720	—	—	—	119
1901	160,431	—	—	—	—	—
1902	162,223	100	—	—	—	1,603
1903	167,925	634	—	1	—	—

* All the figures given here are in metric tons.

Year.	Vianna da Castello, British.	Figueira. British.
	Tons.	Tons.
1894	815	6,003
1895	537	3,187
1896	706	2,632
1897	683	1,118
1898	410	666
1899	716	1,130
1900	542	3,196
1901	1,272	1,274
1902	1,295	624
1903	1,710	1,332

Importation of Coke (Oporto).

Year.	Great Britain.	Germany.	Belgium.	France.	Spain.
	Tons.	Tons.	Tons.	Tons.	Tons.
1894	6,667	1	—	1	10
1895	8,068	1	—	1	—
1896	10,148	1	—	—	—
1897	7,999	1	—	—	—
1898	9,835	—	310	—	—
1899	8,138	—	170	—	—
1900	4,282	430	—	—	—
1901	6,144	—	—	—	—
1902	11,684	—	100	—	—
1903	12,854	—	—	—	—

3. As far as the Spanish frontier and beyond, as coal is occasionally sold from here to Salamanca.

4. Coal is not sold delivered into trucks alongside vessels, but in lighters. These prices (? include) import duty of 380 reis, and lighterage of 150 reis per ton.

Year.	Cardiff.		Newcastle.	
	Highest.	Lowest.	Highest.	Lowest.
	$	$	$	$
1894	7·000	5·500	7·000	4·750
1895	5·300	5·150	7·500	3·625
1896	6·200	5·100	6·250	4·000
1897	6·700	5·900	6·500	5·000
1898	9·000	6·600	8·500	5·500
1899	9·000	6·500	10·000	6·250
1900	12·500	9·300	11·000	9·000
1901	9·000	7·600	9·000	5·875
1902	7·500	6·300	8·000	5·000
1903	6·500	6·350	6·500	4·750

5. Possibly 3,000 to 5,000 tons per annum for all nationalities; the proportion shipped by British vessels would be very small.

6. Has not fallen off.

7. Minho and Douro (State) Railway, 14 reis per metric ton and kilometre; Norte e Leste, price varies according to distance. Beira Alta Railway 18·90 reis per ton per kilometre. No differential rates.

8. No. There are several intelligent coal merchants here who would not be slow to seize any opportunity which might present itself to increase their sales.

9. No exports abroad.

PORTUGUESE EAST AFRICA, *see* BEIRA AND CHINDE.

PORTUGUESE POSSESSIONS IN WEST AFRICA, SOUTH OF GULF OF GUINEA, *see* LOANDA.

THE AZORES, ST. MICHAEL'S.

Enclosure in dispatch, dated St. Michael's, 21st February, 1904, from Mr. William Read, H.B.M.'s Consul at St. Michael's.

1. The present consumption of coal per annum in St. Michael's is about 25,000 tons for bunkers, and 5,000 tons for manufacturing purposes; the quantity used for domestic purposes is insignificant. In addition about 4,000 tons of north country coal are imported for the gas works.

At Fayal 8,000 tons are imported for bunkers, and about 800 tons are used for domestic purposes, wood fuel being scarce and dear.

At Terceira 2,000 tons are imported for use of distilleries.

2. The United Kingdom has been the sole source of supply during the last ten years up to the end of 1903, with the exception of the years 1900 and 1901, when some cargoes were imported from the United States, namely 16,665 tons in 1900 and 14,549 tons in 1901. The importation from the States ceased, however, as the freights were too high.

3. Question 3 is not applicable to the Azores.

4. Prices have been those paid for the coal in the United Kingdom, plus the freight. There are no railways in the Azores.

5. As British steamers coaling at St. Michael's and Fayal greatly exceed in number those of other nations, it may safely be stated that fully two-thirds of the British coal imported here is afterwards shipped for the bunkers of British vessels.

6. There has been a falling off in the quantity of Welsh coal imported during the last two or three years of the period mentioned, owing to the number of steamers calling for coal having decreased, the cause being that some lines of steamers have left off calling here.

7. Query 7 is not applicable as there are no railways in the Azores.

8. If more steamers called here for bunkers, the British coal trade would increase, but if they coal elsewhere it is no use importing coal in larger quantities than actually required.

9. This question is not applicable to the Azores.

10. There is a small duty levied on coal from all countries, but this duty is returned on the coal sold for bunkers.

ROUMANIA.

GALATZ.

Enclosure in dispatch dated Galatz, 16th February, 1904, from Lieut-Colonel Henry Trotter, C.B., H.B.M.'s Consul-General and High Commissioner respecting the Navigation of the Danube.

1. The imports of coal and coke into Roumania in 1902 (the latest year for which statistics are available) amounted to 225,958 tons; the quantity of lignite extracted in the country itself must amount to at least 110,000 tons, making the total annual consumption about 336,000 tons.

Wood fuel is generally used for domestic purposes and it is impossible to form any accurate estimate of the small amount of coal required under that heading.

The consumption of coal in Roumania during 1902 may be roughly estimated as follows:—

Department.	Tons.
Roumanian State Railways - - -	137,674
Roumanian Fluvial Service - - -	15,298
Other Government Departments - -	10,000
Manufactories (including Gas) - - -	78,948
Bunkering Steamers and Tugs at Sulina -	30,000
Bunkering Tugs at Braila - - - -	55,000
Miscellaneous (including Domestic purposes)	9,080
Total -	336,000

2. The accompanying Tables A, B, and C, which have been carefully compiled from the best available statistics, give all the details required.

3. Roumania is provided with a very complete system of railways, and is moreover traversed from west to east by the Danube, so that British coal has very generally penetrated inland whenever there has been any demand for it.

4. The accompanying Table D gives the required information which has been supplied by large importers at Galatz and Braila, and, as regards Sulina, by the European Commission of the Danube.

5. There is little or no bunkering of British vessels at Galatz, Braila, or Constantza; such operations are chiefly confined to Sulina where about 30,000 tons are annually supplied for bunkering vessels of all nationalities, about one-third of which, say 10,000, is supplied to British vessels.

6. It will be observed from Tables A and C that there has been a very large falling off in the import of British

coal, *i.e.*, from 294,291 tons imported through Sulina in 1894 to 106,200 tons in 1903, while the corresponding imports at Constantza have fallen from 13,007 tons to 7,465 tons.

This remarkable decrease may be attributed to two distinct causes (*a*) the rise in prices of Cardiff coal; and (*b*) to the development of the petroleum industry in Roumania.

As regards (*a*), up to 1897 the amount of imports through Sulina remained fairly stationary, but in 1898 prices went up more than 5s. per ton, and the import fell from 275,000 to 195,000 tons; in 1899 prices continued high and the imports fell to 158,000 tons. In 1900, prices became almost prohibitive and the imports fell to 46,480 tons; since that year prices have diminished and imports have increased, but only moderately, and by no means in proportion with the sudden fall. It may be noted that the minimum of 1900 was partly due to the commercial crisis following on the disastrous harvest of 1899.

Another direct consequence of the great rise in the price of Cardiff coal was that cheaper and inferior coals at once found their way into the market. Thus in 1898 it will be seen (Table A) that there was a very large import of German, Russian, and Turkish coal, which have all more or less maintained their position in the market, although since 1900 there has been a considerable falling off in the imports of German coal. The coal from Holland is all Westphalian coal. The Russian Danube Navigation Company up to 1898 always used Cardiff coal supplied from Galatz; now they import their own Russian coal (through Sulina) to Reni to the extent of 10,000 tons annually, a clear loss to British trade which will never be recovered. The Gas Company at Galatz (French) still takes about 12,000 tons of Cardiff coal annually, but the Bucharest Gas Company now employ about 15,000 tons of Turkish coal instead of Cardiff, with the result that Galatz is far better lighted than Bucharest.

As regards (*b*), the great advance in the Roumanian petroleum production has been the means of enabling the State Railway Department to utilize the lignite deposits in the country, which* mixed with petroleum refuse is now employed almost exclusively on their locomotives, thus enabling them to dispense almost entirely with Cardiff coals which up to 1895 and 1896 were exclusively used by the Department. Petroleum is also now largely used as a combustible in the sugar refineries and other manufactories in the county, and will shortly be employed in the ships of the Roumanian Maritime Service, and will naturally come still more generally into use for various purposes.

The production of crude petroleum in Roumania has risen gradually from 64,350 tons in 1894 to 110,000 tons in 1897. In 1898, the year of the great increase in the price of coal, it leapt to 180,000 tons, and again in 1899 to 250,000 tons; since which it has again increased to 310,000 tons in 1902, and to 320,000 tons in 1903. Of this last total, 126,264 tons of various petroliferous productions were exported, leaving, however, 193,736 tons for consumption in the country as against the total output of 64,350 tons in 1894.

In the year 1891–2 the Railway Department alone employed 96,000 tons of Roumanian lignite, mixed with 27,000 tons of petroleum refuse, thus diminishing by about 100,000 tons its demand for Cardiff coal as compared with its requirements ten years previously.

It has also been estimated that the various manufactories in Roumania now consume annually 64,500 tons of foreign coal, 9,000 tons of lignite, 6,000 tons of coke, and 80,500 tons of petroleum. Here again petroleum will probably make rapid strides to the exclusion of foreign coal.

These considerations will amply account for the decreased imports of coal, and it may be anticipated that the requirements of Cardiff coal will, before long, be limited to, say, 30,000 to 40,000 tons for bunkering at Sulina, and another 50,000 tons for bunkering steam tugs at Braila, and perhaps 30,000 tons for various manufacturing purposes, including gas.

7. Identical railway rates are charged for all kinds of coal from whatever source, but the rates vary according to the length of the journey.

* In addition to wood fuel, of which 137,462 tons were employed in the year under review.

Charges for a wagon containing ten tons are as follows:—

Kilometres	Miles.	Francs.	Centimes.	Shillings. s.	d.
50	31·25	32	50	26	0
100	62·50	60	—	48	0
150	93·75	82	50	66	0
200	125·00	100	—	80	0
250	156·25	105	—	84	0
300	187·50	110	—	88	0
350	218·75	115	—	92	0
400	250·00	120	—	96	0

Annexed is a Table (E) giving the charges for intermediate distances, which may possibly be useful for reference.

The charges for despatch of coal by river (in lighters) to up-country ports from Galatz are as follows:—

Name of Port.	Distance in Miles.	Freight Per Ton. s.	d.
Cerna-Voda - - -	80	4	10
Silistria - - -	146	5	7
Roustchouk - - -	179	5	7
Turnu Magurele - -	231	8	9
Lom Palanka - -	312	9	6
Calafat - - - -	336	9	6
Turnu Severin - -	410	10	4

8. It will be manifest from the answers to the preceding questions that the extensive and rapidly extending use of lignite and petroleum, both of which are found in the country, is making Roumania more or less independent of foreign coals, the import of which has fallen off by at least 100,000 tons per annum from these causes, and this figure is likely to be increased in the future rather than diminished.

There remains the competition of foreign coals.

As regards Westphalian coal, the Roumanian Government, in the summer of 1897, in order to find cargo for its newly established line of steamers to Rotterdam, made a contract for the delivery of 180,000 tons in three years, the effects of which are shown in Table A. This coal was mainly used in Government Departments, but it has now fallen into disfavour.

The total imports of coal shown in Table A show that since 1898 there has been a very marked falling off, and that the quantity imported in 1902 is 232,000 tons less than in the former year, and 131,000 tons less than the mean of the three years, 1894–5–6. As the industries of the country are continually progressing this diminution of the demand for foreign coal is solely due to the substitution for it of Roumanian lignite and petroliferous productions.

It has been shown that nearly 100,000 tons of the former is now used by the State Railways, and that in 1903 there was available for consumption in the country 193,736 tons of crude petroleum. The sources of these supplies may, for present purposes, be deemed unlimited, and there would therefore appear to be no prospect of lost ground being recovered, although it is possible that any considerable future decrease in the price of Cardiff coal might lessen the competition of other foreign coals, but the fact remains that the country is becoming more and more self-supporting in the matter of fuel of all kinds.

9. There are no exports of coal or coke from Roumania worthy of notice, these being limited to about 2,000 tons annually exported to Bulgaria; but in 1903, 126,000 tons of petroleum products were exported, of which 35,000 tons were destined for Great Britain.

10. All imported Cardiff or similar coals of whatever origin pay a tax of fifty centimes (4¾d.) the ton customs duty; anthracite and lignite being found in the country are protected by an import duty of five francs the ton (4s.). In addition to the import duty, all coals imported by sea pay a port tax of fifteen centimes (1½d.) per ton; there is also a municipal tax of one franc (9½d.) per ton which is now levied on entry into the country by the Customs Department; thus the total taxation on English coal is fcs. 1·65 cms., or say 1s. 3½d. per ton. German and Austrian coals imported by railway escape the port tax of 1½d. per ton, but otherwise pay the same import duties.

These taxes do not apply to the free port of Sulina, although an attempt is now being made by the Roumanian Government to levy the municipal tax on all

coals imported at Sulina, whether for local consumption or for bunkering purposes. The effect of the measure, if carried out, would probably be to drive a great part of the bunkering trade from Sulina to the Black Sea port of Zunguldak, which of late years has been much resorted to by British and foreign ships, as the coal supplied there, although inferior to Cardiff, is very much cheaper, and there are facilities for loading coal both cheaply and expeditiously.

The Roumanian Government (in order to protect and encourage the local lignite and petroleum industry) also propose, in their new Customs Tariff now preparing, to raise the import duty on foreign coal from fifty centimes (4¾d.) to six francs (4s. 9½d) per ton. The effect of this policy will probably be to drive the bunkering trade for steam tugs (about 55,000 tons) from the Roumanian port of Braila to the Russian port of Reni.

It is estimated by persons in the trade that the imposition of this tax would probably reduce the demand for Cardiff coal about 50 per cent. This would probably apply equally to other foreign coal.

A.—*Table extracted from Roumanian Custom Statistics, showing Imports of Coal and Coke into Roumania in Metric Tons (of 1,00 Kiloso).*

Country of Origin.	1894	1895	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
Great Britain - (a)	249,412	263,083	238,162	295,721	166,679	172,023	47,840	95,237	94,355	
	187	*363*	*1,850*	*1,254*	*1,174*	*945*	*401*	*487*	*227*	
Austria-Hungary -	51,630	41,964	50,783	47,237	80,226	61,587	43,009	26,062	10,773	
	119	*135*	*50*	*289*	*81*	*53*	*259*	*6,842*	*10,238*	
Turkey - - -	590	297	3,153	2,347	8,687	12,331	30,519	26,996	13,035	
	—	—	—	—	*4*	*196*	*58*	—	—	
Germany - -	9,607	7,371	32,235	20,559	109,847 (b)	12,191	5,641	27,820	25,640	
Holland - - -	—	—	100	—	44,490	53,656	15,764	38,722	28,728	
Belgium - - -	—	80	—	—	1,067	—	—	—	402	
Russia - - (c)	—	326	1,853	—	1,322	100	3,161	743	692	
	—	—	—	—	—	—	—	*1,597*	*1,248*	
Bulgaria - - -	1	6	—	4	1	611	595	—	277	
Switzerland - -	10	—	—	—	—	329	—	—	—	
France - - -	—	—	—	—	10	83	—	—	—	
Servia - - (d)	856	—	90	1,129	1,514	5,639	11,631	5,264	3,497	
United States - -	—	—	221	—	—	—	—	—	—	
Total: — Coal and Coke - - -	312,106	313,127	326,597	366,997	413,843	318,550	158,160	220,844	177,399	—
Total:—Lignite and Anthracite - -	*306*	*498*	*1,900*	*1,543*	*1,259*	*1,194*	*718*	*8,426*	*11,713*	—
Landed at Free Port of Sulina (not included in Customs Returns) - (e)	33,953	31,091	38,039	63,584	42,142	30,979	23,949	35,967	36,846	28,673
Grand Total -	346,365	344,716	366,536	432,124	457,244	350,723	182,827	265.237	225,958	—

Figures not yet available.

Remarks.

(a) The import figures for Great Britain include all British coal imported at Constantza, and all that passes up the Danube from Sulina, but do not include the amount landed at Sulina for bunkering and other purposes, generally from 30,000 to 40,000 tons annually.

(b) Of this, 90,685 tons were imported in 1898 by railway through Burdujeni.

(c) This does not include Russian coals landed at Sulina, or which pass through Sulina to the Russian port of Reni on the Danube, now amounting to about 10,000 tons annually.

(d) Mostly in Briquettes, which are largely used by the Roumanian Fluvial Service.

(e) The coal landed at Sulina is not included in the Customs Returns as it is a free port. Most of the coal imported is Cardiff and principally used for bunkering steamers.

N.B.—It will be noted (*see* Remarks) that an addition of 30,000 to 40,000 tons annually should be made to the figures of imports from Great Britain, *i.e.*, the amount imported at Sulina which is is not shown in the Customs Returns.

It may also be noted that the Austrian Danubian Service have a large coal depot on the Danube opposite Galatz, and also at other points on the river, where coal from that Company's mines at Fünfkirchen is landed by special arrangements, free of all charges, but the coal is exclusively employed for bunkering their own steamers. These imports do not appear on the Customs or any statistical reports, and do not effect the general question of coal consumption in the country. They may perhaps amount to some 30,000 tons.

B.—*Table (extracted from Roumanian Custom Statistics) showing Principal Centres of Importation of Coal and Coke into Roumania.*

Name of Town.	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
Braila - - -	134,879	134,814	124,520	114,347	75,086	86,468	25,068	47,357	60,924	Figures not yet available.
Burdujeni - -	14,213	9,956	9,612	16,304	90,685	15,399	9,024	24,641	16,182	
Constantza - -	9,149	21,506	31,360	67,283	59,646	81,135	44,212	66,628	39,628	
Galatz - - -	80,168	84,225	100,404	89,036	78,301	64,293	30,158	49,982	42,268	
Giurgevo - -	31,791	27,848	30,798	32,431	32,740	29,650	18,762	14,297	8,882	
Predeal - -	16,934	19,199	17,257	20,210	59,316	25,556	17,686	7,960	3,211	
Craiova - -	—	—	—	—	—	1,183	336	—	—	
Turnu-Magurele -	—	60	1,715	3,748	1,613	2,451	4,120	—	—	
Turnu-Severin -	13,019	4,723	402	12,450	1,954	3,302	3,732	—	—	
Verciorova - -	—	5,030	2,794	3,309	5,819	5,007	1,861	—	—	
Sulina (*a*) -	33,953	31,091	38,039	63,584	42,142	30,979	23,949	35,967	36,846	28,673
Other Centres -	12,259	6,264	9,635	9,422	9,942	5,300	3,919	18,405	18,017	—
TOTAL -	346,365	344,716	366,536	432,124	457,244	350,723	182,827	265,237	225,958	

REMARKS.

Burdujeni is the frontier railway station for coals imported from Silesia.
Giurgevo is a centre of import of Austrian coals by river.
Predeal is the frontier railway station for coals imported from Hungary.
(*a*) The coal landed at Sulina is not shown in the Custom House statistics, that place being a free port.

C.—*Table (extracted from the Statistics of the European Commission of the Danube) showing Imports of Coal and Coke into the Danube through Sulina; also the country of origin.*

Year.	United Kingdom.		Germany.		Russia.		Turkey.		Total.	
	Coal. Tons.	Coke. Tons.	Coal. Tons.	Coke. Tons.	Coal. Tons.	Coke. Tons.	Coal. Tons.	Coke. Tons.	Coal. Tons.	Coke. Tons.
1894	294,291	—	—	—	—	—	—	—	294,291	—
1895	284,944	—	—	—	984	—	260	—	286,188	—
1896	264,448	3,670	31,013	—	—	—	90	598	295,551	4,268
1897	275,610	12,591	8,619	—	—	—	286	—	284,515	12,591
1898	195,027	2,804	48,085	—	4,948	—	3,747	—	251,807	2,804
1899	157,876	—	31,483	—	7,358	—	8,649	—	205,366	—
1900	46,481	—	4,485	—	10,979	—	14,534	—	76,479	—
1901	95,273	—	41,924	—	10,735	—	1,714	—	149,646	—
1902	126,689	—	20,775	—	8,892	—	1,756	—	158,112	—
1903	106,200	—	13,637	10	10,721	426	6,672	1,071	137,230	1,507

REMARKS.—Of the coal imported through Sulina, from 30,000 to 40,000 tons, mostly of Cardiff coal, is retained for bunkering steamers; about 1,500 tons is consumed in the town. The remainder is carried up the Danube for inland consumption, and is included in the figures given in Table A.

D.—*Table showing Prices of British Coal imported* 1894–1903.

Port.	1894.		1895.		1896.		1897.		1898.		1899.		1900.		1901.		1902.		1903.	
	Highest Price.	Lowest Price.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.	H. P.	L. P.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Galatz. — Best Cardiff: Double screened	20 0	19 0	19 7	18 0	19 1	17 6	21 7	20 0	26 1	24 6	24 1	22 6	35 7	34 3	29 3	27 8	23 7	22 0	23 4	21 0
Braila. — Best Cardiff: Double screened	23 11	20 3	21 10	19 8	21 0	19 6	21 5	19 0	30 0	22 9	29 6	23 0	43 6	29 4	38 0	27 0	25 6	22 9	24 0	23 1
Sulina. — Best Cardiff: Double screened	23 0	17 0	16 6	16 4	17 3	16 7	18 11	17 10	28 6	22 6	23 10	21 2	39 8	33 0	26 6	23 4	21 4	21 0	21 9	21 9
Constantza.—Best Cardiff: Double screened	Varying from 16s. in 1895 to 26s. 11d. in 1901.																			

Remarks.—Prices at Galatz and Braila are free on railway trucks on quay, and include total municipal tax of 9½d. per ton, and from 1901 an import tax of 6d. per ton.
The prices given for Galatz in 1898 were for coals imported just before and immediately after the strike, and the maximum was no doubt higher than the figures given.
The prices for Sulina are the contract prices paid for coal by the European Commission of the Danube, who consume annually about 5,000 tons (f.o.b.).

N.B.—It is impossible to obtain reliable figures for these years for coals other than English. Cardiff coal is a sort of standard, and the prices of other coals vary according to that of the standard. At Galatz, North Country coal may be taken as about 3s. per ton, and Westphalian coal at about 1s. 6d. per ton lower than Cardiff. Austrian coal at Galatz is about the same price as Cardiff, but is rarely met with.

Since the rise in price in 1900, Servian coals have been imported on a fairly large scale at Braila, and were sold in 1900 at 24s. 7d.–28s. 7d.; in 1901 at 21s. 5d.–23s.; in 1902 at 17s. 5d.–19s.; in 1903 at 17s. 5d.–19s. per ton, but with the lowered price of Cardiff coal these imports have now almost entirely ceased. Turkish coal at Constantza during the last four years has cost about 18s. c.i.f. per ton.

E.—*Roumanian Local Railway Rates on Coals, per* 10,000 *Kilogrammes.*

Kilometers.	Francs.	Kilometers.	Francs.	Kilometers.	Francs.	Kilometers.	Francs.	Kilometers.	Francs.	Kilometers.	Francs.	Kilometers.	Francs.	Kilometers.	Francs.
1	5.55	59	37.80	116	67.75	173	91.20	230	103	287	108.70	344	114.40		
2	5.55	60	38.40	117	68.20	174	91.55	231	103.10	288	108.80	345	114.50		
3	5.55	61	39	118	68.70	175	91.90	232	103.20	289	108.90	346	114.60		
4	5.55	62	39.55	119	69.15	176	92.25	233	103.30	290	109	347	114.70		
5	5.55	63	40.15	120	69.60	177	92.60	234	103.40	291	109.10	348	114.80		
6	5.55	64	40.70	121	70.05	178	92.90	235	103.50	292	109.20	349	114.90		
7	5.55	65	41.30	122	70.50	179	93.25	236	103.60	293	109.30	350	115		
8	5.55	66	41.85	123	71	180	93.60	237	103.70	294	109.40	351	115.10		
9	6.20	67	42.40	124	71.45	181	93.95	238	103.80	295	109.50	352	115.20		
10	6.90	68	43	125	71.90	182	94.30	239	103.90	296	109.60	353	115.30		
11	7.60	69	43.55	126	72.35	183	94.60	240	104	297	109.70	354	115.40		
12	8.25	70	44.10	127	72.80	184	94.95	241	104.10	298	109.80	355	115.50		
13	8.95	71	44.65	128	73.20	185	95.30	242	104.20	299	109.90	356	115.60		
14	9.60	72	45.20	129	73.65	186	95.60	243	104.30	300	110	357	115.70		
15	10.30	73	45.80	130	74.10	187	95.95	244	104.40	301	110.10	358	115.80		
16	10.95	74	46.35	131	74.55	188	96.25	245	104.50	302	110.20	359	115.90		
17	11.60	75	46.90	132	75	189	96.60	246	104.60	303	110.30	360	116		
18	12.30	76	47.45	133	75.40	190	96.90	247	104.70	304	110.40	361	116.10		
19	12.95	77	48	134	75.85	191	97.20	248	104.80	305	110.50	362	116.20		
20	13.60	78	48.50	135	76.30	192	97.55	249	104.90	306	110.60	363	116.30		
21	14.25	79	49.05	136	76.70	193	97.85	250	105	307	110.70	364	116.40		
22	14.90	80	49.60	137	77.15	194	98.15	251	105.10	308	110.80	365	116.50		
23	15.60	81	50.15	138	77.55	195	98.50	252	105.20	309	110.90	366	116.60		
24	16.25	82	50.70	139	78	196	98.80	253	105.30	310	111	367	116.70		
25	16.90	83	51.20	140	78.40	197	99.10	254	105.40	311	111.10	368	116.80		
26	17.55	84	51.75	141	78.80	198	99.40	255	105.50	312	111.20	369	116.90		
27	18.20	85	52.30	142	79.25	199	99.70	256	105.60	313	111.30	370	117		
28	18.80	86	52.80	143	79.65	200	100	257	105.70	314	111.40	371	117.10		
29	19.45	87	53.35	144	80.05	201	100.10	258	105.80	315	111.50	372	117.20		
30	20.10	88	53.85	145	80.50	202	100.20	259	105.90	316	111.60	373	117.30		
31	20.75	89	54.40	146	80.90	203	100.30	260	106	317	111.70	374	117.40		
32	21.40	90	54.90	147	81.30	204	100.40	261	106.10	318	111.80	375	117.50		
33	22	91	55.40	148	81.70	205	100.50	262	106.20	319	111.90	376	117.60		
34	22.65	92	55.95	149	82.10	206	100.60	263	106.30	320	112	377	117.70		
35	23.30	93	56.45	150	82.50	207	100.70	264	106.40	321	112.10	378	117.80		
36	23.90	94	56.95	151	82.90	208	100.80	265	106.50	322	112.20	379	117.90		
37	24.55	95	57.50	152	83.30	209	100.90	266	106.60	323	112.30	380	118		
38	25.15	96	58.	153	83.70	210	101	267	106.70	324	112.40	381	118.10		
39	25.80	97	58.50	154	84.10	211	101.10	268	106.80	325	112.50	382	118.20		
40	26.40	98	59	155	84.50	212	101.20	269	106.90	326	112.60	383	118.30		
41	27	99	59.50	156	84.85	213	101.30	270	107	327	112.70	384	118.40		
42	27.65	100	60	157	85.25	214	101.40	271	107.10	328	112.80	385	118.50		
43	28.25	101	60.50	158	85.65	215	101.50	272	107.20	329	112.90	386	118.60		
44	28.85	102	61	159	86	216	101.60	273	107.30	330	113	387	118.70		
45	29.50	103	61.50	160	86.40	217	101.70	274	107.40	331	113.10	388	118.80		
46	30.10	104	62	161	86.80	218	101.80	275	107.50	332	113.20	389	118.90		
47	30.70	105	62.50	162	87.15	219	101.90	276	107.60	333	113.30	390	119		
48	31.30	106	62.95	163	87.55	220	102	277	107.70	334	113.40	391	119.10		
49	31.90	107	63.45	164	87.90	221	102.10	278	107.80	335	113.50	392	119.20		
50	32.50	108	63.95	165	88.30	222	102.20	279	107.90	336	113.60	393	119.30		
51	33.10	109	64.40	166	88.65	223	102.30	280	108	337	113.70	394	119.40		
52	33.70	110	64.90	167	89	224	102.40	281	108.10	338	113.80	395	119.50		
53	34.30	111	65.40	168	89.40	225	102.50	282	108.20	339	113.90	396	119.60		
54	34.90	112	65.85	169	89.75	226	102.60	283	108.30	340	114	397	119.70		
55	35.50	113	66.35	170	90.10	227	102.70	284	108.40	341	114.10	398	119.80		
56	36.05	114	66.80	171	90.45	228	102.80	285	108.50	342	114.20	399	119.90		
57	36.65	115	67.30	172	90.80	229	102.90	286	108.60	343	114.30	400	120		
58	37.25														

For distances of 400 kilometers and upwards the rate is invariable at 3 centimes of a franc per 1,000 kilogrammes per kilometer.

KUSTENDJIE (Constantza).

Enclosure in dispatch, dated Galatz, 16th February, 1904, from Lt.-Colonel Henry Trotter, C.B., H.B.M.'s Consul-General, at Galatz.

Report of Mr. P. Zohrab, Vice Consul at Kustendjie.

1. From 7,000 to 8,000 tons of coal are sufficient to meet the annual requirements of this Vice-Consular district. It is impossible to state separately the quantity used for domestic purposes and manufacturing or steam purposes, as no statistics on this point are available. The latter purposes, however, demand but a small portion of the supply, as beyond a few mills, a cement factory, and some blacksmiths' shops, no manufactories of any kind exist. In the countryside very little coal is employed, wood and cow-dung mixed with straw forming the fuel of the peasantry. The bulk of the supply discharged at this port for local consumption may, therefore, be considered as destined to meet the demands of the towns of Kustendjie and Medjidieh. Cernavoda obtains its supply from Braila and Galatz; and Mangalia receives its coal in sailing craft from the port of Zunguldak, on the Turkish coast of the Black Sea, some 500 tons per annum.

2. Prior to the year 1898 all coal imported came in British vessels from Cardiff. In that year German and Turkish coals were introduced, and have since figured conspicuously in the list of imports to the detriment of the British product.

The following figures, with reference only to British coal imported in British bottoms, show the tendency of the importation to decline:—

Year.	Cardiff Coal Imported in British Vessels.	
	Tons.	
1894	13,007	
1895	28,397	Rise due to opening of bridge at Cernavoda.
1896	31,681	Ditto.
1897	54,373	
1898	12,053	Fall due to coal strike.
1899	23,374	
1900	440	Tendency to decline due to introduction of German and Turkish coal, lignite, petroleum, and wood.
1901	4,273	
1902	3,203	
1903	7,465	

Roumanian vessels have discharged a certain quantity of British coal, but figures are not available. This coal, however, is landed in transit, and is imported for Government use, regardless of local demand. The fall in the demand for British coal, is nevertheless, shown by the fall in the quantity imported under the British flag.

3. Up to the year 1895 the coal landed at Kustendjie was destined for the use of the district only and averaged about 10,000 tons per annum. In that year, however, the opening of the Danube Bridge at Cernavoda transformed Kustendjie into a port for goods in transit by diverting part of the river trade to this port, owing to the facilities offered by the bridge for the passage of merchandise into the interior of Roumania. The amount of the imports, especially coal, landed at this port in consequence increased considerably, though the requirements of the district remained practically unchanged, except with regard to coal, in respect of which article the demand has diminished for reasons which will be given further on. The bulk of the coal landed here is destined for other parts of Roumania, some 7,000 to 8,000 tons being sufficient to supply the annual local demand, whereas prior to 1895 the average annual supply amounted to 10,000 tons.

4. No statistics are available for answering this question satisfactorily, owing to the occasional and irregular manner in which coal has been imported by local merchants. It is impossible to state the highest and lowest prices obtained for British coal in any given year. All that can be ascertained is that during the past ten years prices for Cardiff coal (cost to importer, c.i.f.) have fluctuated between 16s. in 1895 and 26s. in 1901.

5. Practically nothing. Kustendjie is not a coaling station and no facilities exist for bunkering vessels. Occasionally, but very rarely, a ship has required a few tons. To show how far Kustendjie is from being a coaling port it may be mentioned that ships have gone from here to bunker at Zunguldak, and that many vessels entering this port have contracts for coaling at the Turkish port, because it offers every facility for doing so cheaply and expeditiously.

6. The import of British coal has fallen off considerably since the year 1898, owing to the following causes:—

(a) The use of Westphalian coal by the State railways, brought in their own steamers from Rotterdam.

(b) The utilization of lignite mixed with petroleum, as fuel for railway locomotives.

(c) The employment recently of petroleum as fuel by the passenger steamers of the "Service Maritime Roumain."

(d) The increased consumption of wood, owing to the facilities afforded by the Danube Bridge for introducing this article of fuel into this district from the interior of the country.

(e) The introduction of Turkish coal, which though considerably inferior to the British product is preferred, owing to its lower price, amounting to about 18s., c.i.f., during the past four years. Previous to 1900, gas coal for Bucharest was imported, viâ the Danube, from the North of England, now Turkish coal from the mines of Heracleia, shipped at Zunguldak for Kustendjie, has ousted the British article in this instance to the extent of 15,000 tons annually.

The best qualities of Cardiff coals are affected by these changes, to what extent may be judged by the figures given above with respect to the import of British coal in British bottoms.

7. Railway rates are the same for all kinds of coal from whatever source, and amount to about 45 centimes per kilometre per wagon of ten tons, between this port and Bucharest.

8. So far as this district is concerned there appears to be no way of increasing the import of British coal. Buyers here are apparently more particular in regard to price than to quality, so, being cheaper than British, Turkish coal will continue to find greater favour in the market. The demand, moreover, for coal in this district is limited, and local importers are far more influenced by the state of the market elsewhere in Roumania than by local demand. Such was not the case before the opening of the Danube Bridge in 1895.

9. No coal or coke is exported from this district.

10. There are no import duties or impositions affecting the competitive power of British coals. All coals are treated alike, paying 65 centimes import duty and one franc communal tax per 1,000 kilogrammes.

The importation of British coke, anthracite and patent fuel has hitherto been so insignificant that it has not been thought necessary to take these articles into consideration.

Extract from a letter, dated Kustendjie, 5th February, 1904, from Mr. Vice-Consul P. Zohrab, addressed to Lt.-Colonel Henry Trotter, C.B., Consul-General and High Commissioner respecting the Navigation of the Danube, Galatz.

"There was practically no import of British coal in 1900, only 440 tons were landed here. I cannot ascertain prices for that year because the importer of that small amount resides at Braila, and is not a local merchant.

"I have just ascertained that the highest price paid in 1901 was 11d. higher than given in my Report, viz., 26s. 11d.

"The only importer of Westphalian coal is the Roumanian Government; no local importers deal in that article, and I am told by the authorities here to apply to Bucharest for contract prices. Here all are subordinates and fight shy of furnishing information.

"Turkish coal during the past four years has been 18s. c.i.f. per ton.

"P.S.—"I have just been informed that the Service Maritime Roumain paid 16 marks (20 francs) last year per ton; but I am not satisfied as to the truth of this information."

SULINA.

Enclosure in dispatch, dated Galatz, 16th February, 1904, from Lt.-Colonel Henry Trotter, C.B., H.B.M.'s Consul-General at Galatz.

Report of Mr. P. C. Sarell, Vice-Consul at Sulina.

Sulina possesses very little interest from the point of view of the Royal Commission on the Supply of Coal. It is computed that about from 30,000 to 40,000 tons of British coal are annually landed here. The bulk of this serves for bunkering steamers, or supplying tugs and other craft plying in the river, while an average of about 1,600 tons is annually consumed in the town.

No other outlet exists here for the coal trade.

There appears to be little or no scope for developing the bunkering trade. The geographical position of the place is hardly favourable for it, and the necessity for regulating the draught of water according to the depth on the bar would also be an obstacle to coaling here on a large scale.

British coal easily holds its own for bunkering purposes, and the amount of foreign coal imported is insignificant.

No reliable figures are procurable, and the local Customs authorities are not authorised to give any information, even if they possess it.

Sulina is practically inaccessible by land, being surrounded by swamps; and there are no exports of coal from this district.

RUSSIA.

BATOUM.

Enclosure, in dispatch dated Batoum, 26th January, 1904, from Mr. P. Stevens, H.B.M.'s Consul at Batoum.

1. The quantity of coal consumed annually in the district of this Consulate is approximately estimated at 20,000 tons, of which quantity about 18,500 tons are used at the ports of Batoum, Poti, Novorossisk and other points along the Caucasian coast for bunkering steamers engaged in the coasting trade, and the remaining 1,500 tons are consumed for domestic purposes at the same places. An insignificant quantity of this coal finds its way by rail further inland.

2. The coal markets along the coast have drawn their supplies of coal, during the past ten years, from the coal mines situated in the coal region of the Don; a very small quantity being occasionally also drawn from the mines of the coalfields of the Trans-Caucasus at Kvibuli, in the Province of Kutais; although coal from the last mentioned place is very inferior in quality, and unless manufactured into patent fuel is of very little value for purposes of raising steam.

3. No British coal has been imported to any ports, towns or places in this Consular district during the past ten years. Railway communication has existed, during the whole of this period, with most of the principal towns at which any demand for coal was likely to take place.

4. No British coal was sold in this Consular district for the purposes referred to during the period mentioned. Russian steam coal was furnished to vessels at prices fluctuating from 30s. to 32s. 6d. per ton.

5. Nil.

6. No falling off has taken place, as there has been no trade in British coal during the period spoken of. Previous to the opening of the Petrovsk-Baku railway, British coke, from 6–800 tons per annum, used to be imported to Batoum and consumed by the local iron foundries and those at Tiflis and Baku; but since the year 1899 Russian coke from the Don basin is brought down by rail at through rates and has completely ousted British coke from the Caucasian markets. In 1903 the Caucasus Copper Company imported 500 tons of North Country, and 50 tons of Welsh coke for their smelting works near Batoum, but owing to the duty, it came out dearer than Russian coke which the Company is now using.

7. No differential rates exist for the transport of British coal or coke.

8. Under the conditions here obtaining, I much doubt whether any measures could be adopted in order to establish, encourage or develop a trade in British coal and coke with the Caucasus. The railways in the northern Caucasus and the Trans-Caucasus use liquid fuel, which is furnished them by the petroleum wells at Baku and

at Grozni in the Province of Ter. All steamers on the Caspian Sea also employ liquid fuel for steam purposes, large quantities of which are also consumed by factories and for domestic purposes throughout the Caucasus.

9. Under ordinary circumstances no coal or coke is exported from this country; but on one occasion, some three years ago, during the winter months, when there was a dearth of coal at Odessa and the Sea of Azoff was frozen up, Batoum shipped about 3,500 to 4,000 tons of coal which came from the coal fields at Kvibuli. The railway uses, I understand, a certain quantity, about 3,000 tons, of this latter mentioned coal for its workshop at Tiflis and at other points of the line.

10. Foreign coal pays a duty of 6 copecks per pood and coke 9 copecks per pood, which are equal to 7s. 9d. and 11s. 7½d. per ton. The rates charged for the transport, by rail, of Russian coal from the Don Basin are:—

From Rostoff to Baku, 10.55 cops. per pd.
„ „ „ Batoum 17.08 „ „ „

or 13s. 8d. and 22s. 0½d. per ton, respectively. The sea freights for coal and coke from Maropol to Batoum fluctuate between 3 and 5 copecks per pood, or 3s. 10½d. to 6s. 5½d. a ton.

N.B. The Russian currency has been converted into English money at the rate of 9.60 roubles to the £.

HELSINGFORS.

Enclosure in dispatch, dated Helsingfors, 15th March, 1904, from Mr. Chas. J. Cooke, H.B.M.'s Consul at Helsingfors.

1. About 116,000 tons, almost all for steam, manufacturing and gas-making purposes.

2. Great Britian.

3. Very little goes inland, and mostly then by rail. The vast forests make fuel cheap, and some of the many waterfalls are utilized for motive power.

4. The prices have been from 14s. to 16s. for Scotch, 15s. to 17s. for best Yorkshire and Newcastle, and 17s. to 19s. for Welsh coal per ton during the last ten years, except in 1901, when the prices went up to 20s. to 26s. per ton. No other coals are sold in Finland.

5. Hardly any.

6. The consumption of coal has much increased of late years.

7. The railway rate is 13 Finnish pennis (13 centimes) per 100 kilogrammes for a distance up to 20 kilometres, a reduction being allowed for longer distances, so that up to 80 kilometres the maximum reduction is 70 per cent. There are no differential rates.

8. The coal trade is not likely to increase much, as peat fuel is beginning to be used.

9. No.

10. No import duty in Finland on coal, but there is a possibility of the almost-prohibitive Russian Custom House tariff being introduced before long, with its consequent deadening effect on all foreign trade.

MOSCOW.

Enclosure in dispatch, dated Moscow, 26th January, 1904, from Mr. H. Montgomery Grove, H.B.M.'s Consul at Moscow.

1. There are no statistics available whatever. Leading local coal merchants estimate the present consumption of coal in Moscow at about 10,000,000 poods (1 pood equals 36 lbs.) per annum. This is virtually entirely for manufacturing or steam purposes, as wood or kerosine are used for domestic purposes.

2. The source of supply is the coalfields in the valley of the Donetz. Until a few years since, whilst the railway was not working freely, a small amount of British coal was to be found in Moscow.

3. Am not aware of any British coal now in Moscow, and have never heard of it penetrating beyond Moscow.

4. Does not apply to Moscow.

5. Does not apply to Moscow.

6. The reason why the quantity of British coal and coke imported into this district has now entirely ceased is, that it can no longer compete in price with Russian coal. The classes of British coal formerly imported were "steam" and "smithy."

7. No British coal in Moscow. Railway rates alike for Russian or foreign coal.

8. I do not think anything can be done.

9. There is no export of coal from Moscow; it is all brought to Moscow.

10. The duty charged on imported coal varies according to what frontier it enters by. The following are the rates as laid down in the existing and proposed tariffs:—

	Proposed.	Existing.	
Coal—	s. d.	s. d.	
(1) Ports of Black Sea and Sea of Azov	7 10½	7 10½	per ton.
(2) Western land frontier	3 11¼	1 11¾	„
(3) Baltic ports	1 11¾	1 11¾	„
Coke—			
(1) Ports of Black Sea and Sea of Azov	11 10	11 10	„
(2) Western land frontier	5 11	2 11½	„
(3) Baltic ports	2 11½	2 11½	„

Both coal and coke free at ports of White Sea.

ODESSA.

Enclosure in dispatch, dated Odessa, 13th May, 1904, from Lieutenant Charles S. Smith, R.N., H.B.M.'s. Consul-General at Odessa.

1. My Consular District is as big as France, and, as put, this question would need inquiry in different towns, which would probably not be very correctly answered.

South Russia is chiefly supplied with coal from the Donetz basin, a little comes from Dombrovo in Poland and a little from England. Unless the Commission attaches importance to knowing the consumption according to British Consular Districts, perhaps it may suffice to give the totals coming from the different sources which would, over a term of years, represent the consumption.

The following Table gives imports of British coal at Odessa:—

	Tons.		Tons.	
1893	65,670	1899	160,200	
1894	104,539	1900	112,000	(?)
1895	92,963	1901	97,225	
1896	81,470	1902	17,636	
1897	56,950	1903	28,000	
1898	32,480			

The following Table shows the amounts imported at Nicolaief:—

	Tons.		Tons.
1895	350	1899	21,330
1896	222	1900	2,590
1897	—	1901	—
1898	—	1902	—

The following Table gives the output for the Donetz Valley:—*

Years.	Long tons.
1895	4,833,500
1896	5,055,500
1897	6,726,800
1898	7,494,200
1899	9,107,200
1900	11,216,100

In the book from which I have taken the above I find it stated that of the whole Russian production the Donetz mines give 65 per cent.—Poland gives 30 per cent.—Ural 2.75 per cent.—Central Russia 1 per cent.—and the Caucasus and Siberia give 1.25 per cent.

The following Table from the same book gives the proportional disposal of Russian coal:—

	1890 per cent.	1900 per cent.
Railways	31	23
Domestic purposes	33	23
Smelting Industries	18	35
Private Industries	1	7
Sugar Refineries	10	8
Navigation	7	4

* Jules Cordeweener—La Crise Industrielle Russe. Krivoi-Rog, le Donetz, &c.

2. The sources of supply during the last ten years ending 1903 were the Donetz district, the Warsaw district (Dombrovo), and coal imported from Great Britain. During the last ten years the coal imports have, on the whole, gradually diminished.

3. British Coal imported into Odessa has penetrated as far as Kiev during the last ten years. The means of transportation has been the South Western Railway.

4. At Odessa British coal is not discharged into railway trucks alongside the ship but is carted into store. The cost of cartage varies from ¼ to ½ a kopek per pud—that is to say, 4d. to 8d. a long ton.

The following has been its price in store:—

	s.	d.		s.	d.
1894	22	7¼		—	
1895	22	3¾		—	
1896	from 23	7½	to 27	6¾	
1897	from 24	11¼	to 27	6¾	
1898	from 28	10½	to 31	6	
1899	34	1½		—	
1900	from 34	1½	to 38	0¾	
1901	28	10½		—	
1902	do			—	
1903	do			—	

The prices obtained for Russian coal are the following:—

Year.	Donetz Manufacturing purposes. From.		Donetz Manufacturing purposes. To.		Donetz Domestic purposes. From.		Donetz Domestic purposes. To.		Warsaw Domestic purposes. From.		Warsaw Domestic purposes. To.	
	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.	s.	d.
1894	19	8¼	22	3¾	24	11¼	27	6¾	19	8¼	26	3
1895	,,		,,		,,		,,		,,		,,	
1896	,,		,,		,,		,,		,,		,,	
1897	,,		,,		,,		,,		,,		,,	
1898	18	4½	21	0	23	7⅓	26	3	23	7½	24	11¼
1899	,,		,,		,,		,,		,,		,,	
1900	,,		,,		,,		,,		,,		,,	
1901	17	0¾	20	0	22	11¾	23	3	24	11¼	26	3
1902	,,		,,		,,		,,		,,		,,	
1903	,,		,,		,,		,,		,,		,,	

5. Practically no British coal imported into this district has been afterwards shipped for the bunkers of British vessels. The duty of 8s. per ton is too heavy.

6. The quantity of British coal and coke imported into this district has, on the whole, steadily decreased during the last ten years. This is attributable to the high protective duty and to the increased output of the Donetz district. The increase in 1899 to 1901 shown in the Table given in Answer 1 is attributable to permission granted to certain selected companies to import a limited quantity of coal at a reduced tariff of 1½ kopeks per pud (1s. 10d. per long ton). As explained on page 7 of my Commercial Report No. 2522, this concession was granted because of the distress caused by the failure to keep up the supply of native coal. Steam coal has been chiefly affected by the duty. A limited quantity of British coal for domestic and gas purposes is still being imported, but the quantity diminishes yearly.

7. There are no differential rates for the British coal as compared with the native coal or other imported coals. The railway rates for all coals for distances up to 3,000 versts are the following:—

Distances.	Per Pud.
1 to 7 versts	0.11 of a kopek.
7 ,,	0.13 of a kopek.
8 ,,	0.15 of a kopek.
9 ,,	0.17 of a kopek.
10 ,,	0.19 of a kopek.

and so on increasing 0.02 of a kopek per pud per verst.

Note.—At the present exchange one kopek per pud per verst means 23.8d. per ton per mile.

8. The import of British coal and coke has been killed by the high duty. The British Government take 1s., and the Russian Government take, in the Black Sea, 7s. 10½d., per long ton. The yearly import at Odessa used, about 1890, to stand at a quarter of a million tons. It was in 1903 only about 28,000 tons, and this in spite of a great industrial development in Odessa.

If the Russian duty could be reduced to that collected in the Russian Baltic Ports (1½ kopeks per pud or 2s. a long ton) there would no doubt be a great impetus to the trade, an impetus which would also be beneficial in reducing the number of British vessels entering Odessa in ballast. But a further difficulty would remain, which is that the Russian coal trade gives six months credit.

9. Not I think from my Consular District.

10. By the law quoted on page 11 of my Report No. 2709 it appears that a British ship arriving from abroad must pay a tonnage due of 10 kopeks per ton (about 2½d. per ton) of cargo-carrying capacity. Russian ships trading in the same sea (the Black and Azov Seas are considered as one) are exempt.

A pud tax of ¼ of a kopek per pud (4d. per long ton) is payable on coal arriving from abroad. Coal transported by coasting vessels pays ⅓ of this amount. These are trifles, but all reckon in.

RIGA.

Enclosure in dispatch, dated Riga, 6th April, 1904, from Mr. A. Woodhouse, H.B.M's Consul at Riga.

	Riga.	Libau.	Pernau.	Windau.	Total.
					tons.
1	428,300 tons of coal and coke for manufacturing and steam purposes, including about 20,000 tons for gas making. Very little coal is used for domestic purposes.	150,000 tons, of which 95,000 tons are for manufacturing purposes, 40,000 tons for Government requirements, and 15,000 tons for domestic purposes.	62,000 tons for steam purposes - - -	7,800 tons for steam purposes. - - -	648,100
2	Almost exclusively Great Britain; but trifling quantities have occasionally been received from Westphalia:—	Great Britain. In 1895 an attempt was made to introduce Westphalian coal.	Great Britain - - - - - - -	Great Britain. In 1897-8 and 1899 small quantities of Westphalian coal were received.	—
	Quantities received.	Quantities received.	Quantities received.	Quantities received.	
	In 1894, 196,522 tons.	In 1894, 86,903 tons,	In 1894, 3,378 tons.	In 1894, 3,378 tons.	290,181
	„ 1895, 219,582 „	„ 1895, 93,029 „	„ 1895, 2,836 „	„ 1895, 3,095 „	318,542
	„ 1896, 239,557 „	„ 1896, 97,132 „	„ 1896, 3,403 „	„ 1896, 3,005 „	343,097
	„ 1897, 279,262 „	„ 1897, 104,014 „	„ 1897, 2,590 „	„ 1897, 2,741 „	388,607
	„ 1898, 313,185 „	„ 1898, 110,975 „	„ 1898, 2,028 „	„ 1898, 2,845 „	429,036
	„ 1899, 523,320 „	„ 1899, 184,962 „	„ 1899, 15,563 „	„ 1899, 5,220 „	729,065
	„ 1900, 526,508 „	„ 1900, 296,496 „	„ 1900, 40,375 „	„ 1900, 5,162 „	868,541
	„ 1901, 378,364 „	„ 1901, 150,648 „	„ 1901, 37,320 „	„ 1901, 4,581 „	570,813
	„ 1902, 396,969 „	„ 1902, 120,454 „	„ 1902, 42,086 „	„ 1902, 5,475 „	564,984
	„ 1903, 428,300 „	„ 1903, 150,000 „	„ 1903, 62,000 „	„ 1903, 7,800 „	648,100
3	Most of the coal imported is consumed in the town and neighbourhood; small quantities have, however, recently been sent to Dorpat, Kovno, Pskoff, Vitelsk and Wilna.	Practically all the coal received is consumed on the spot. Some years ago the Libau-Romney Railway had a contract for English coal, but returned to wood. In 1899, some 20,000 tons went to Charkoff, presumably for the railway.	No coal is sent from Pernau, all being consumed by the factories and local steamers.	All consumed on the spot - - -	—
	Coal can only be transported inland by rail.				
4	Prices of coal in this district have always been governed by the British market, and have fluctuated accordingly. The feeble attempts to introduce German coal have had no effect whatever on quotations.				
5	Not more than 500 tons annually - - -	From 200 to 300 tons per annum - - -	Nil.	Only a trifling quantity - - - -	
6	The importation of ordinary steam—North Country and Scotch—coal, fell off in 1901, owing to the exclusion of foreign coal from the railways, but it is again steadily increasing.	The imports of steam coal from Scotland and the North have varied occasionally, but have steadily increased during the last ten years. There will now probably be less of this coal required for the harbour works, which are approaching completion, but on the other hand, more may be wanted for the Imperial Navy. There will also be a small demand for Cardiff coal.	The importation of North Country and Scotch coal has greatly increased during the past five years, in consequence of the establishment of manufacturing industries in the neighbourhood.	The quantity of coal imported to Windau is at present small, but it will probably increase.	
7	The Railway Rates for coal are the same on all lines, viz:—from 1s. 2d. to 3s. 6d. per ton, exclusive of loading and discharging, according to distance. No differential rates for British coal.				
8	The coal trade in this district is as carefully watched by the various importers and merchants, many of whom are agents for British Colliery owners, that there is no danger of it falling off.				
9	No.	No.	No.	No.	
10	The competitive power of British coal stands without a rival in these provinces. The Import Duty is one and a half copeck per pound, or about 2s. per ton, on all coal imported irrespective of origin.				

ROSTOV-ON-DON.

Extract from dispatch, dated Rostov-on-Don, 17th January, 1904, from Mr. A. G. Brophy, H.B.M.'s Consul at Rostov-on-Don.

"Absolutely no British or other foreign coal or coke is now imported into this Consular region owing to the supplies from the Marinpol and other native coal-fields being more than sufficient for the present or prospective needs of the country. Indeed, this Russian coal would be a competitor, at least, in the Roumanian, Bulgarian, and Turkish Markets, were it not that up to the present the working and transport expenses do not allow of it being put down quite cheaply enough, quality for quality, in these foreign ports; but the Russian Government, in conjunction with the colliery owners and the Railway and Steamship Administrations, are studying the means to reduce the present high charges militating against exportation."

ST. PETERSBURG.

Enclosure in dispatch, dated St. Petersburg, 1st March, 1904, from Mr. Oliver Wardrop, H.B.M.'s Consul at St. Petersburg.

1. The present consumption of coal per annum may be taken as one-and-a-half million tons. The exact quantity imported in 1903 for Cronstadt and St. Petersburg was 1,447,292 tons.

For domestic purposes the use of wood is universal. The comparatively few open fires in houses do not consume more than three or four thousand tons per annum, and all the rest of the coal imported is for steam and manufacturing purposes, including, say, 100,000 tons for the Imperial Admiralty.

2. The sources of supply during the last ten years have been almost entirely British. In 1901 the Americans sold two cargoes at St. Petersburg and one at Reval, at a price slightly inferior to that quoted at the time for British coal. In 1903 two or three cargoes of German coal were sold here, price unknown. Hitherto, German coal has been unable to compete here with British, owing to the distance of German mines from the sea.

3. Though there are facilities for transportation by railways and waterways, British coal has not penetrated more than 10 or 15 miles inland. At one time there was a small quantity sent to Moscow, but the trade has ceased entirely, and Moscow district takes Russian coal, which can be delivered cheaper, including railway freight from the mines.

4. No information can be obtained as to the highest and lowest prices in each of the last ten years; but the following Table shows the average prices, delivered into railway trucks and including the customs duty of 2s. 6d. per ton, which has remained invariable:

Quality.	Years.									
	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d	s. d	s. d	s. d.
East Coast Scotch -	14 0	14 0	14 0	14 6	15 0	16 0	23 0	18 0	16 0	16 0
Hamilton Ell - - -	15 6	15 6	15 6	16 0	16 6	17 6	24 6	19 6	17 6	17 6
Newcastle Primes -	16 6	16 6	16 6	17 0	17 6	18 6	25 6	20 6	18 6	18 6
„ Seconds -	15 6	15 6	15 6	16 0	16 6	17 6	24 6	19 6	17 6	17 6
Yorkshire - - - -	17 6	17 6	17 6	18 0	18 6	19 6	26 6	21 6	19 6	19 6
Cardiff - - - -	20 6	20 6	20 6	21 0	21 6	22 6	29 6	24 6	22 6	22 6

5. There is practically no coal shipped for the bunkers of British Steamers. Occasionally, but rarely, foreign steamers take a little.

6. The following Table shows the annual import for the last ten years:

Year.	Tons.
1894	1,236,410
1895	1,225,109
1896	1,239,451
1897	1,219,364
1898	1,437,691
1899	1,914,093
1900	1,639,089
1901	1,472,239
1902	1,448,112
1903	1,447,292

It will been seen that, instead of falling off, the quantity largely increased in 1898, and that the increase has been maintained; 1899 and 1900 were exceptionally good years, but subsequent industrial depression brought the figures back to approximately the same quantity as in 1898.

7. There are no differential rates for British coal as compared with native coal or other imported coals.

8. I can make no suggestion as to how the British coal trade in this district can best be maintained or increased, though I have consulted the chief British importers on the point.

9. There are no exports of coal or coke.

10. There is no differential treatment of any kind which affects the competitive power of British coals, and I have no other information bearing on the question.

The above information applies to St. Petersburg and Cronstadt.

His Majesty's Consul at Helsingfors has doubtless been asked to furnish a similar report; the other Finnish ports which are in my district do not call for special attention.

In the Baltic, Reval is the chief coal importing town of this consular district, and I have applied to the Vice-Consul there for a report, which will be forwarded as soon as it is received, if it seems likely to be of interest.

From Archangel, the Acting Vice-Consul writes that the local consumption is about 20,000 (twenty thousand) tons; it is all steam coal and all British; there is no coal sent inland; the prices for Newcastle Primes during the last ten years have been as low as 15s. (fifteen shillings) and as high as 22s. (twenty-two shillings); there is no export, and hardly any bunker coal is shipped.

WARSAW.

Enclosure in dispatch, dated Warsaw, 21st January, 1904, from Mr. Alex. P. Murray, H.B.M.'s Consul-General at Warsaw.

1. No official or reliable statistics are available, but so far as I can learn from private sources, the consumption of coal per annum in the Consular district of Warsaw was in 1902:—

(*a*) For domestic purposes	842,277	tons.
(*b*) For manufacturing and steam purposes	4,128,483	,,
	4,970,760	

2. The sources of supply in each year during the ten years up to the end of 1902 (no information being obtainable yet for 1903) were:—

Year.	Poland (Dombrowa).	Russia (Donetz).	Germany (Silesia).	Great Britain
	Tons.	Tons.	Tons.	
1892	2,933,183		119,633	
1893	3,222,650		129,600	
1894	3,411,800		202,233	
1895	3,746,083		209,300	
1896	3,746,417	So far as I can learn, no Donetz coal was used here until 1902.	265,866	Not more than 1,000 tons in any one year. No exact figures obtainable.
1897	3,830,400		317,833	
1898	4,161,133		447,900	
1899	4,041,466		799,150	
1900	4,177,500		874,650	
1901	4,315,260		814,233	
1902	4,297,687	28,740	644,333	

3. A small quantity of British coal is imported through Königsberg up the Niemen in barges for use in factories at Kovno and Vilna. Still smaller quantities of British coal and coke are imported through Dantzig up the Vistula in barges, for use at Wloclawek and Nieszawa and for furnaces.

4. None.

5. None.

6. No variation.

7. There is no universal rate of freight for coal per ton per mile in this Consular district, but the only possible way to import British coal at a price at which it could compete with local or German coal would be by water ways.

There are no differential tariffs as between British and other foreign coal, but foreign coal pays a rather higher rate than local coal by the railways communicating with the German frontier.

8. No opening.

9. About 65,000 tons of Polish coal are exported to other parts of Russia and about 35,000 tons to Germany and Austria. The export is not increasing, as the coal is of inferior quality, containing a large amount of Sulphur.

10. As Silesian coal is sold in Russia 15 per cent. cheaper than in Germany, and is better adapted than Russian coal to a great many purposes, it is only natural that a certain amount of foreign coal should be imported. Polish coal not being suitable for making coke, ironworks are obliged to import it, too, for the blast furnaces.

The extra cost of carriage, however, renders it impossible for Great Britain to compete with Germany in the supply of either in Poland.

SPAIN.

ALGECIRAS.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M.'s Consul at Cadiz.

Report of Mr. W. J. Smith, Vice-Consul at Algeciras.

The only coal imported here from the United Kingdom is about 9,000 tons per annum of Scotch coal imported for the Algeciras-Bobadilla Railway.

No coal is used here for domestic purposes. About 1,500 tons are brought here per annum for the Electric Light Company, and one or two other small industries, but these coals are purchased by retail in Gibraltar.

No steamers are bunkered here, Gibraltar being so close.

The railway rates on all coals are the same.

There are no exports of coal or coke from this district.

BARCELONA.

Enclosure in dispatch, dated Barcelona, 5th February, 1904, from Mr. J. F. Roberts, H.B.M.'s Consul-General at Barcelona.

1. About 750,000 to 800,000 tons.

The quantity used for domestic purposes is the residue of the gas coal otherwise coke—about 130,000 tons.

In a few private houses and hotels some coal is used but the quantity is too insignificant to take note of. All the remainder, except some 15,000 tons for bunkers, is used for manufacturing purposes.

2. The sources of supply during the last ten years, namely, 1894 to the end of 1903 inclusive, were—

1894.	Great Britain	about	532,000	tons.
1895.	Great Britain	„	512,000	„
„	Australia	„	4,455	„
„	Antwerp	„	926	„
„	Dunkirk	„	3,400	„
„	Spain	„	16,000	„
„	United States of America	„	8,000	„
1896.	Great Britain	„	561,000	„
„	United States of America	„	4,000	„
„	Belgium	„	470	„
„	Spain	„	30,750	„
1897.	Great Britain	„	548,000	„
„	Spain	„	43,800	„
1898.	Great Britain	about	320,000	tons.
„	Spain	„	150,000	„
1899.	Great Britain	„	508,000	„
„	Spain	„	134,000	„
1900.	Great Britain	„	510,000	„
„	Spain	„	135,000	„
„	United States of America	„	16,000	„
1901.	Great Britain	„	590,000	„
„	Spain	„	145,000	„
„	United States of America	„	7,000	„
„	Belgium	„	1,000	„
„	Holland	„	1,800	„
1902.	Great Britain	„	650,000	„
„	Spain	„	92,000	„
„	Holland & Belgium	„	17,000	„
„	United States of America	„	4,000	„
1903.	Great Britain	„	664,570	„
„	Spain	„	74,852	„
„	Holland & Belgium	„	23,752	„
„	United States of America	„	7,239	„

3. Coal has penetrated everywhere in this District where there are railways, by rail and thence by carts to the more distant villages.

4.

Year.		Highest Large Coal.	Highest Small Coal.	Lowest Large Coal.	Lowest Small Coal.
		£ s. d.	£ s. d.	£ s. d.	£ s. d.
1894.	Cardiff	1 2 3	0 16 9	1 0 2	0 16 2
„	Newcastle	0 13 9	—	0 13 6	—
1895.	Cardiff	1 0 2	0 15 0	0 19 6	0 14 5
„	Newcastle	0 14 0	—	0 13 3	—
1896.	Cardiff	0 19 9	0 14 6	0 19 5	0 13 6
„	Newcastle	0 15 9	—	0 14 2	—
1897.	Cardiff	1 1 9	0 16 5	0 19 5	0 14 9
„	Newcastle	0 17 0	—	0 14 7	—
1898.	Cardiff	1 5 0	0 19 0	1 0 6	0 15 8
„	Newcastle	0 19 6	—	—	—
1899.	Cardiff	1 3 6	0 18 9	1 2 9	0 17 0
„	Newcastle	0 19 9	—	0 19 5	—
1900.	Cardiff	1 13 6	1 7 9	1 12 6	1 2 0
„	Newcastle	1 10 0	—	1 8 0	—
1901.	Cardiff	1 18 0	1 5 0	1 6 3	0 18 0
„	Newcastle	0 19 0	—	0 18 0	—
1902.	Cardiff	1 3 6	0 16 6	1 0 9	0 15 3
„	Newcastle	0 19 3	—	0 15 9	—
1903.	Cardiff	1 1 6	0 16 0	1 1 0	0 15 3
„	Newcastle	0 17 6	—	0 16 9	—

These prices represent delivered on to Quay of Barcelona.

5. About 15,000 tons used for bunkers of vessels of different nations.

6. It has had a steady rise each year.

7. Railway rates for coal from Barcelona to—

Badalona	1 ptas.	12 cts.	per 1,000 kilos.
Premia	2 ,,	50 ,,	,, ,,
Sabadell	2 ,,	50 ,,	,, ,,
Villanneva	2 ,,	50 ,,	,, ,,
Mataro	2 ,,	75 ,,	,, ,,
Tanasa	3 ,,	50 ,,	,, ,,
Gerona	8 ,,	—	,, ,,
San Juan de las Abadesas	8 ,,	70 ,,	,, ,,
Mauresa	9 ,,	— ,,	,, ,,
Lerida	13 ptas.	— cts.	per 1,000 kilos.
Tarragona	16 ,,	— ,,	,, ,,
Madrid	27 ,,	— ,,	,, ,,

To above rates a 5 per cent. Government Tax must be added.

There are no differential rates in favour of British or other imported coals.

8. It is steadily on the increase and prosperous, therefore can make no suggestions.

9. There are none, as the coal from the local mines at Berga and San Juan de las Abadesas is all consumed here.

10. The import duty is Customs duty 2·50 ptas. per 1,000 kilogrammes. Spanish coal from Asturias sells at about 7 to 10 pesetas per ton cheaper than British coal.

BILBAO.

Enclosure in dispatch, dated Bilbao, 12th February, 1904, from Mr. Cecil G. Wood, H.B.M.'s Consul at Bilbao.

1. The present total consumption of foreign coal is some 540,796 tons, of which 524,281 tons come from the United Kingdom. It is estimated by the principal coal importers (no statistics being available), that 30,000 tons, approximately, are used here annually for domestic purposes. Cardiff coal is preferred, but its cost keeps its importation down to about 10,000 tons per annum.

2. Newport is the principal source of imported coal, Newcastle coming in the second rank, whilst various places in Scotland contribute occasional cargoes.

3. British coal coming in through this port just reaches Madrid in one direction, and Zaragoza in the other—these two places accounting for from four to six thousand tons independently of some small quantities taken by towns on the two main railway lines.

4. It is not possible to ascertain the highest and lowest prices obtained for British coal delivered in the manner alluded to, for coal is not discharged into railway trucks alongside vessels in Bilbao; but I am informed on reliable authority that the average price in normal times has been about 32 pesetas (19s. 4½d.) per ton for Newport coal and 30 pesetas (18s. 2d.) for Newcastle, placed on railway truck. Exchange 33 pesetas per £.

During the great strike in Wales some four or five years ago, the price per ton reached as high as 50 pesetas, Bilbao having held on to the British product notwithstanding the high prices, and refrained from following the example given by Barcelona and Cadiz, both of which places then imported their requirements from America.

Calculations on the lines of this question might be based upon the prices ruling in England during the last ten years, added to the list* of coal freights to Bilbao, as well as upon the Customs dues and port charges.

5. So far but a small quantity, say from 4,000 to 5,000 tons; but since the inauguration of the pontoon depôt within the harbour last year, it is estimated that some 20,000 tons will be shipped for the bunkers of British ships.

6. As it will be perceived by the annexed Table† the quantity of British coal imports has increased rather than fallen away, whilst, however, the amount does not, as hitherto, supply all local requirements, owing to the fact that the native mines are developing, and are naturally competing with it, at least in quantity and price.

As an instance of the above it may be noted that the local gas works, which hitherto used 14,000 tons of British coal, have for the last two years employed the native product.

The importation of coke has diminished, however, owing simply to the local production, and particularly since 1900, when the "Altos Hornos" Company established Coke Ovens adapted to the treatment of mixtures of British and the comparatively dry native article from the coalfields of Léon.

Since this, the mines which had been supplying as much as 43,000 tons per annum to the above Company had also however to cease producing coke at a heavy loss to themselves, owing to the expenses they had incurred for the setting up of coke-making plant. They now, in order to retrieve their losses, have started the manufacture of "briquettes" for native railways and other uses.

The total amount of coke imported ‡ last year from England and Germany was 79,702 tons, the United Kingdom's share being 78,538 tons.

7. Railway rates for coal (there is no differential tariff) are as follows:—by Northern Railway (main line), 12½ cents. per ton and kilometre which amount is only collected on short distances, e.g., as far as Poves near Miranda.

For greater distances than the above a special and cheaper tariff is in force as follows:—

On the Barcelona Line—

Bilbao to Miranda	pesetas	14 per ton	=	8s. 5d.
,, ,, Logroño	,,	15 ,,	=	9s. 1d.
,, ,, Pampelona	,,	18 ,,	=	10s. 10d.
,, ,, Casetas	,,	20 ,,	=	12s. 1d.
,, ,, Zaragoza	,,	21 ,,	=	12s. 8d.

On the Madrid Line—

Bilbao to Burgos	pesetas	17 per ton	=	10s. 3d.
,, ,, Valladolid	,,	20 ,,	=	12s. 1d.
,, ,, Medina	,,	23 ,,	=	13s. 11d.
,, ,, Segovia	,,	25 ,,	=	15s. 1d.
,, ,, Madrid	,,	28 ,,	=	16s. 11d.

Average exchange 33 pesetas per £. Exchange to-day 35 pesetas per £.

8. Cheaper prices would tend to increase the importation of British coal. The 1s. duty on export from the United Kingdom is much complained of, and it appears that importers are seeking to supply their wants from Germany as German coal is quoted at 1s. less than Monmouthshire.

The only way to encourage importation is apparently the reduction of prices or of export and import duties.

9. There is no exportation of coal or coke.

10. The import duties are the same for all foreign coal, and at present amount to 2½ pesetas per ton plus 7 centimes for port dues—the former being paid by the receiver, the latter by the ship.

"From the above replies it will be observed that British coal is holding its own here and in San Sebastian, even against the Spanish mineral, and that the further encouragement and development of its importation into these parts is dependent upon the modification of export and import duties, and upon the ruling of average prices."—*Extract from Mr. Consul Cecil G. Wood's dispatch dated Bilbao, 12th February, 1904.*

Remarks on Spanish Coal.

The native coal mines in this Northern region began to acquire an important development in the year 1894, when the Robla railway line was opened for the purpose of placing the inland fields of Palencia and Léon in direct communication with Bilbao.

The total production of these mines amounted in 1902 to somewhat over 2,614,000 tons, of which 1,766,100 were raised in the Northern regions, Asturias, Léon, Palencia, and Burgos.

Oviedo in Asturias gave 1,441,000 tons, viz., 576,000 tons screened mineral and 865,000 tons dust. Of this quantity, 526,900 tons were used in Oviedo itself. In the interior of Spain and by the Northern Railway, 381,000, and exported coastwise 533,100 tons.

* See Tables Nos. 2 and 3.
† See Table No. 4.
‡ See Table No. 5.

The inland provinces of Spain gave :—

Léon,	196,600	Tons.
Palencia,	124,900	
Burgos,	3,600	

The imposition of protective duties was called for by the coalfields' owners, etc., against the foreign article and an extra peseta per ton was placed upon all imported coal except upon consignments destined for metal manufactories.

This duty was abolished some three years ago owing to the fact that the largest consumers of foreign coal were the metal foundries.

Asturias coal for a period of nine years has been competing very strongly with the British product in Santander; but the establishment there, a year and a half ago, of an iron and steel works called the "Nueva Montagna," has now caused a re-opening of British coal importation to the amount of 87,615 tons from which 37,026 tons of coke were produced in 1903.

Some eight years ago the amount usually imported *i.e.*, 70,000 tons, was reduced to 17,000 tons.

From Mr. Vice-Consul Winter Singles' Memorandum * the general requirements of Santander were only 51,298 tons of native coal last year.

In 1898, 28,000 tons of Spanish coal or thereabouts came into Bilbao by sea—now by sea and rail, 177,000 tons.

The Asturias coal is poor in quality compared with the British, and it requires 50 per cent. more than the Cardiff to produce equivalent power, and in gas production 30 per cent.

The cost of sea transport to this place is six pesetas (3s. 7½d.) a ton from the Asturias, and by rail from Léon ten pesetas (6s. 0½d.), while the port dues are twenty five centimes (1¾d.) per ton.

The analysis † of Spanish coal, herewith enclosed, will enable comparison to be drawn between it and British coal which is so much superior that it is sufficiently freely mixed with the former to give it heat-keeping power as well as to lower working outlay.

The local production of coke, shown by Table No. 5, was increased last year by 84,169 tons, owing to the output of the "Altos Hornos" Iron Works.

* See Report from Santander Vice-Consulate.
† See Table No. 6.

TABLE NO 2.

Ten year's freights for British Coal.

	1894	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	s. d.	s. d. s. d.	s. d.	s. d.	s. d. s. d.	s. d.	s. d.	s. d. s. d.	s. d.	s. d.
Welsh - - -	4 3	4 0 to 4 3	5 0	4 8	4 4½ to 5 8	4 7½	5 3	4 0 to 4 1	3 8½	3 7½
	s. d.	s. d. s. d.	s. d. s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Newcastle -	3 9	3 0 to 3 1½	3 1½ to 3 4½	3 6½	3 8	4 3	4 6	3 9	3 7½	3 7½

TABLE NO. 3.

Prices of Welsh Coal f.o.b. Bilbao.

(*Exchange at* 30 *pesetas per* £.)

1894. 15s. per ton plus 1s. 8d. per ton duty.
1897. 13s. to 13s. 9d. for large coal, 10s. 6d. for small.

(*Exchange at* 39·10 *pesetas per* £.)

		s. d.		s. d.	Pesetas.
1898.	From January to March - -	12 11	- - - -		25 to 28
	In April - - - - -	16 10	to	17 4 - -	33 „ 34.
	„ May - - - - -	24 7	„	25 6 - -	48 „ 50.
	„ October - - - - -	17 4	„	20 5 - -	34 „ 40.
	„ November - - - -	17 4	„	18 5 - -	34 „ 36.
	„ December - - - -	15 10	„	16 10 - -	31 „ 33.

Prices Lancashire Coal, average exchange 39·10 *pesetas per* £.

		s. d.		s. d.	Pesetas.
1898.	May - - - -	21 3	to	22 9 - - - -	42 to 44.
	June - - - -	21 11	„	23 0 - - - -	43 „ 45.
	August - - - -	19 5	„	20 5 - - - -	38 „ 40.
	September } October } - - -	17 4	„	18 5 - - - -	34 „ 36.

TABLE NO. 4.

Quantities of Coal imported into Bilbao during the last ten years.

Foreign Coal.

Year.	Quantities in English Tons.		
	From the United Kingdom.	From Germany.	Total.
1894.	338,692	28,594	367,286
1895.	343,283	—	343,283
1896.	367,910	2,907	370,817
1897.	425,412	5,824	431,236
1898.	308,582	14,694	323,276
1899.	419,926	8	419,934
1900.	516,582	20,618	537,196
1901.	480,224	19,594	499,818
1902.	522,480	3,021	525,501
1903.	524,281	16,381	540,662

Native Coal.

Year.	Quantities in English Tons.		
	From Asturias. By Sea.	From Léon and Palencia. By Railway.	Total.
1894.	95,000	—	95,000
1895.	120,500	—	120,500
1896.	113,430	4,925	118,355
1897.	113,406	30,406	143,812
1898.	141,000	54,000	195,000*
1899.	129,740	83,000	212,740*
1900.	Not obtainable.	120,000	—
1901.	104,606	67,211	171,817
1902.	101,588	88,500	190,088
1903.	76,450	100,851	177,301

* Increase owing to strike in South Wales.

TABLE NO. 5.

Quantities of Coke imported into Bilbao during the last ten years.

Year.	Quantities in English Tons.		
	From the United Kingdom.	From Germany.	Total.
1894	70,700	57,810	128,510
1895	69,747	1,878	73,213
1896	80,850	15,281	96,131
1897	95,901	—	95,901
1898	78,210	6,351	84,561
1899	95,745	693	96,438
1900	96,964	951	97,915
1901	59,842	4,134	63,976
1902	54,395	689	55,084
1903	78,538	664	79,202

Production of Native Coke.

Year.	Quantity in English Tons.				
	At Vizcaya Iron Works from British Coal.	At San Francisco Iron Works from British Coal.	At Altos Hornos Iron Works from British and Spanish Coals.	At Sabero Mines and brought by railway for Altos Hornos Works.	Total.
1894	84,680	25,000	—	—	109,680
1895	Not procurable.				
1896	88,000	30,000	—	—	118,000
1897	88,600	45,000	—	17,712	151,312
1898	80,940	50,000	—	43,280	174,220
1899	95,654	55,132	—	26,811	177,597
1900	101,695	24,000	29,627	28,020	183,342
1901	95,868	55,267	61,055	10,000	222,190
1902	75,560	39,408	84,994	—	199,962
1903	75,278	82,000	84,169	—	241,447

TABLE NO. 6.

Analysis of the Best Native Coal taken from Consul Smith's Commercial Report for the year 1894.

Names of the Mines.	Solid Carbon.	Ashes.	Volatile Substances.	Iron Pyrites.
Sucesiva - - - - -	79·534	3·070	11·892	0·504
Abundante - - - - -	72·890	5·120	20·630	1·360
Palentina - - - - -	68·128	13·107	14·935	3·830

Inland Mines.

Latest analysis:—

Solid Carbon	72	per cent.
Ashes	8	,, ,,
Water and Volatile Substances	20	,, ,,
	100	,, ,,

Names of the Mines.	Carbon.	Ashes.	Water and Volatile Substances.	Coke per 100.	Heat Units (Calories).
Riosa	55·80	6·04	38·16	61·84	6,385·42
Sama de Langreo	54·87	5·24	39·86	60·16	6,093·94
Siero	54·56	2·50	42·94	57·07	6,095·70
Olloniego	55·70	8·38	35·92	62·29	—
Mieres	61·28	2·79	35·93	64·08	—
Lena	64·14	6·83	29·03	70·97	—
Santaforme	47·80	9·60	42·60	57·40	5,734·02
Arnao	43·33	13·17	43·50	56·50	4,688·50
Colunga	80·95	5·95	13·10	86·90	7,307·02

Mines on Seaboard.

CADIZ.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, *from Mr. A. L. Keyser, H.B.M's Consul at Cadiz.*

1. From 65 to 70,000 tons. Quantity used for domestic purposes insignificant. Charcoal is generally used.

2. Great Britain and Spain.

3. As far as Posadas. The facilities for transportation have been the same during the whole period, viz., the Andaluces Railway Line from Cadiz to Seville and Cordoba, and the Madrid to Zaragoza and Alicante Railway Line from Seville to Cordoba.

4. Table showing the highest and lowest f.o.b. prices obtained for British coals in each of the last ten years as compared with those obtained for Spanish coals during the same periods:—

Year	Cardiff and Newcastle.		Asturias.		Average rate of Exchange.
	Highest.	Lowest.	Highest.	Lowest.	
	s. d.	s. d.	s. d.	s. d.	Ptas.
1894	18 6	17 0	24 7	23 3	29·25
1895	21 9	17 6	23 7	22 6	28·85
1896	20 9	14 9	22 6	21 2	30·25
1897	21 9	14 7½	19 10	19 2	35·00
1898	22 0	13 10½	15 7	14 5	50·00
1899	19 6	15 9	24 11	24 11	31·30
1900	33 6	19 7½	25 6	24 6	32·20
1901	25 6	21 6	22 9	22 9	34·30
1902	23 5	19 1½	23 1	23 1	33·83
1903	21 11	18 3	19 10	19 10	34·00

The prices for Spanish coals have been calculated on the average rate of exchange during the year referred to. This gives the actual amount paid.

5. The proportion of British coal imported into Cadiz which is afterwards shipped for the bunkers of British vessels does not exceed 1 per cent. All British ships visiting Cadiz carry sufficient coal for the voyage.

6. The quantity of British coal imported has somewhat fallen off during the last years, owing to the greater use of Spanish coals from Asturias, which is being imported now even by gas companies, who before used Newcastle exclusively.

Both Cardiff and Newcastle coals are affected, although Cardiff to a greater extent.

7. Under the general tariff of the Andaluces Railway Company, the rates chargeable on coal, whether native or foreign, from Cadiz to any station up to Seville is 8.30 ptas. per ton of 1,000 kilogrammes (at 34.00=4s. 11d. per ton of 2,204·62 lbs.).

There is also a special tariff under which coals pay 0.10 ptas. per ton (1,000 kilogrammes) when the distance is from 101 kilometres to 200 kilometres (62 to 124 miles) and 0.08 ptas. from 200 kilometres upwards.

In addition, by a special agreement with the owners of the coalfields at Belmez (Cordoba), all coals shipped at the coalfields are sent to any station in their line at the rate of ptas. 0.05 per ton and kilometre. This enables them to compete advantageously with any imported coal.

To the above rates 5 per cent. traffic tax must be added in every case.

8. The only apparent way is the reduction of duty on coal and special railway rates.

9. There are no exports from this district.

10. The duties and charges on British coals as compared with Spanish coals are the following:—

British.

Duty - - -	Ptas. 2.50	per ton of 1,000 kilos.
Transport tax -	„ 0.50	„ „ „ „ „
Harbour Board Dues	„ 0.25	„ „ „ „ „
(1s. 11d. at 34.00) -	Ptas. 3.25	per ton of 1,000 kilos.

Spanish.

Transport Tax -	Ptas. 0.15	per ton of 1,000 kilos.
Harbour Board Dues	„ 0.075	„ „ „ „ „
(About 1½d. at 34.00)	Ptas. 0.225	per ton of 1,000 kilos.

CANARY ISLANDS, *see* LAS PALMAS AND TENERIFFE.

CORDOBA.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M.'s Consul at Cadiz.

Report of Mr. R. E. Carr, Vice Consul at Cordoba.

1. 35,000 tons for manufacturing or steam purposes. No coal is used for domestic purposes.

2. The Belmez Coalfield, and, to a very limited extent, South Wales through Seville.

3. As far as Posadas a good many cargoes were brought a few years since for the mines of the district.

4. Price per ton on wagon at coalfield to-day for consumption in—

Kinds.		Cordoba.	Málaga.	Sevilla.	Baeza.
		Ptas.	Ptas.	Ptas.	Ptas.
Coal	Large	41	33	36	38
	Screened	35	32	30	32
	Smalls	23	22	22	24
	Briquettes	33	27	25	29
	Coke	47	32	35	50
Anthracite	Large	22	22	22	22
	Screened	24	24	24	24
	Nuts	20	20	20	20
	Smalls	7	7	7	7

I cannot give the prices each year for the last ten years. At the beginning of that period, coal was only worth about one-half of present prices, but it gradually rose until in 1898, during the Spanish War with the United States, prices reached their highest, being 25 per cent. more than at present. After the war prices went down again.

As this is not a Port, I do not attempt to give prices of British coal.

5. This question does not apply here.

6. I believe that no British coal is now imported into this district owing to prices of Belmez coal being regulated precisely to shut it out.

7. There are no differential rates for British Coal.

The rates are as follows—

Seville to Cordoba ..	Ptas. 6.25	per ton	(1,000 kls.)
Málaga to Cordoba ..	„ 27.00	„ „	(„ „)
Belmez to Málaga ..	„ 13.25	„ „	(„ „)

8. I do not consider that British coal has any chance whatever in this district owing to the presence of a good coalfield here

9. Coal is sent to Linares, Granada, Jaen, and an attempt is being made to compete with British coal in Málaga itself. The exports to above places are gradually increasing as new industries arise.

HUELVA.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M.'s Consul at Cadiz.

Report of Mr. E. L. Ricketts, Vice-Consul at Huelva.

1. The present consumption of coal per annum is roughly as follows—

	Tons.
For railway and steam purposes - -	77,000
For bunkering steamers - - -	9,000
For gas - - - - - - - -	6,000
For domestic purposes - - - -	500
Total- - -	92,500

Of these 92,500 tons, 87,000 are Welsh coal and 5,500 Newcastle coal.

In addition to this, about 300 tons, which are extracted from Spanish mines, are employed for smithy purposes.

2. For reasons before stated there are no official Customs particulars yet available, but according to the best private information nothing but English coal has come here, except a quantity not exceeding 2,000 tons of Spanish, during the whole period under review.

3. British coal has penetrated by the Zafra-Huelva line 200 miles inland.

As the other railway lines pass through other ports before proceeding inland, coal is naturally not carried by them from here.

4. No one is willing to give me detailed prices of coal during the last ten years, but the lowest I have ascertained have been 17s. 6d. for Welsh and 16s. for Newcastle in trucks alongside, with as much as 30s. during the strikes in Wales and the Spanish-American War.

5. Practically no British ships bunker here.

6. The quantity of British coal imported shows a steady increase year by year.

7. The rates of transport on home coal in this district by the Zafra Railway are 11 pesetas per ton for small, and 9 pesetas for large quantities, irrespective of distance.

8. The trade is likely to maintain itself and flourish naturally as mining and railway operations increase.

9. There is no export of coal or coke.

10. The import duties are the same as all over Spain, and the port charges do not affect the competitive power of British coal, as British and Spanish minerals are subject to equal light and harbour dues.

LAS PALMAS (Canary Islands).

Enclosure in dispatch, dated Teneriffe, 19th February, 1904, from Mr. J. E. Croker, H.B.M.'s Consul at Teneriffe.

1. About 345,000 tons are imported now annually for the supply of steamers; of this quantity only about 2,000 tons are used for manufacturing and domestic purposes.

2. Cardiff, Wales; only about 2,000 tons of North Country coal coming from Newcastle and Liverpool in the year.

3. Fourteen miles, by cart only.

4. The prices for Welsh steam coal have varied during the past ten years from 20s. to 29s. per ton. North country about the same. There are no railways in the island of Grand Canary.

5. About two-thirds of the British coal is bunkered into British steamers.

6. British coal imports have increased and are increasing every year.

7. There is no difference in rates on any coal, and there are no railways.

8. Trade increasing.

9. There is no export of coal or coke from this district.

10. The Las Palmas Electric Light Works (a Belgian company) have used patent briquette fuel brought in sailing vessels from Antwerp, but this has been discontinued, and they are now using British North Country coal.

During the coal strike in Wales in 1900 about 8,000 tons of Pocahontas coal was brought from the United States, but this was found to be very liable to combustion if kept in store on shore for any length of time.

The coal trade here is entirely in British hands and likely to remain so.

The foregoing replies have been furnished by Mr. Vice-Consul Swanston.

PORT ST. MARY.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M.'s Consul at Cadiz.

Report of Mr. R. J. Pitman, Vice-Consul at Port St. Mary.

The consumption of coal is limited to the Gas and Electric Light Company, one distillery, one flour-mill, and one brewery. House coals are not imported. Coke is generally used for domestic purposes, and is supplied by the Gas Company from their works here or from those they have at Cadiz.

SANLUCAR.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M.'s Consul at Cadiz.

Report of Mr. A. J. Aparicio, Vice-Consul at Sanlucar.

The only importers of coal in this district are the Gas Company, who bring from 800 to 1,000 tons per annum from Newcastle for consumption.

No other coal is imported beyond some 100 tons yearly which the Electric Light Company obtains from Seville, and which is sent down here by rail.

The railway company consume Spanish coal, a large deposit of which is constantly kept in the station at Jerez.

SAN ROQUE.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M.'s Consul at Cadiz.

Report of Mr. G. F. Cornwell, K.C., Vice-Consul at San Roque.

With the exception of a few truck-loads of coal, amounting annually to about 300 tons, obtained from Gibraltar by the Industria Corchera at Linea de la Concepcion, belonging to Messrs. Larios Hermanos, of Gibraltar, there is no importation of coals into this district, for domestic purposes or as an article of trade, through the Custom House at Linea.

There are no exports of coal or coke from this district.

SAN SEBASTIAN.

Enclosure in dispatch, dated Bilbao, 12th February, 1904, from Mr. G. Wood, H.B.M.'s Consul at Bilbao.

Report of Major J. A. Nutt, Vice-Consul at San Sebastian.

1. The consumption of coal in this district is about 100,000 tons per annum, of which about 4,000 are used for domestic purposes.

2. The coal imported from England is in the proportion of three-fifths of the consumption, and the remainder comes from Asturias (Spain).

3. British Coal has gone as far as Madrid in wagons of the Norte de España Railway Company. The charges from Pasajes to Madrid is 26 pesetas per ton.

4. During the Spanish-American War, Cardiff coal was sold here at 55 pesetas per ton and North Country coal at 44 pesetas per ton on the wharf. Newcastle foundry coke was sold at 75 pesetas per ton. The lowest price for British coal has been 26 pesetas. The present price is 38 pesetas for Cardiff coal, 30 pesetas for North Country coal, and 34 pesetas for Spanish coal.

5. A very small quantity of British imported has been shipped for the bunkers of British vessels; the proportion being 1½ per cent.

6. The imports of British coal and coke have fallen off a little lately, owing, I am informed, to the 1s. Export Tax which the buyer pays. The coals most affected are the Cardiff.

7. The railway rates are equal for all kinds of coal, native and foreign.

8. The British coal trade in this district might undoubtedly be increased if the Port of Pasajes, where all vessels can unload alongside the wharf, were better known to British shipowners. At present the freight of steamers to Pasajes is very high. Expenses at Pasajes are about equal to, perhaps less than, Bilbao, and yet the coal freight to Pasajes is 1s. or 1s. 6d. more than to Bilbao. Certainly vessels must, in most cases, go on in ballast from Pasajes to Bilbao, but it is only a five hours' voyage, and so does not account for the difference in freights. Cargoes, moreover, can be discharged quicker at Pasajes than at Bilbao. The harbour is a most safe and excellent one in every respect.

9. No coals or coke are exported from this district.

10. Custom House duties on British coals are 2½ pesetas per ton and 20 centimes for fees to Custom House employées.

SANTANDER.

Enclosure in dispatch, dated Bilbao, 12th February, 1904, from Mr. C. G. Wood, H.B.M.'s Consul at Bilbao.

Report of Mr. Winter W. Single, Vice-Consul at Santander.

1. The present consumption of coal per annum is 138,913 tons, viz., British 87,615 tons and native 51,298 tons. It is impossible to state the exact quantity used for domestic purposes, but I am informed this may be put down at about 15,000 tons, thus leaving a balance of, say, 123,913 tons for manufacturing and other purposes.

2. The sources of supply during the last ten years and long before have been Great Britain and native coal, which is raised in the Provinces of Asturias, Palencia, and Léon.

3. British coal has not penetrated inland during the last ten years. The requirements of inland towns are supplied by native coal, which is transported by railway.

4. The lowest prices obtained for Scotch coal delivered into railway trucks alongside vessels during the last ten years ranged from 16s. to 18s. and the highest 25s. to 30s. Lowest price for Welsh 18s. to 21s. and highest 32s. to 34s. Lowest price for North Country 17s. to 19s. and highest 26s. to 31s. Native coal, as a rule, obtains about the same price as North Country.

5. Of the British Coal imported into my district about 1,000 tons is afterwards shipped for the bunkers of British vessels.

6. The quantity of British coal imported into my district has not fallen off during these last years; on the contrary, the increase has been considerable, and I have every reason to presume the increase will continue. Coke is not imported.

7. Railway rates chargeable on coal differ according to distance. There are no differential rates for British coal.

8. British colliery proprietors, agents, and shippers strain every nerve to maintain their hold on this market, and I do not think more can be done than what is being done to retain the trade and to increase same.

9. There are no exports of coal or coke from my district.

10. British coal pays a duty of 2 pesetas 50 centimes per ton.

SEVILLE.

Enclosure in dispatch, dated Cadiz, 6th April, 1904, from Mr. A. L. Keyser, H.B.M's Consul at Cadiz.

Report of Mr. E. F. Johnston, Vice-Consul at Seville.

1. Present annual consumption is from 80,000 to 90,000 tons. For domestic purposes probably not over 100 tons are used by a few foreigners and hotels. For cooking and heating, charcoal is used.

The coal is used for bunkering steamers, manufacturing, and gas-making.

2. About 75 per cent. from Great Britain, and balance from Spanish collieries.

3. The interior of Spain, north of Seville, is practically entirely supplied with Spanish coal, British coal being used in ports and adjacent districts south of Seville. Rail and road are the only means of transport.

4. I regret it is impossible to give prices year by year, as no statistics are available. The variations during the last ten years have been:—

Welsh coal from - - 35 to 50 Ptas. per ton.
Scotch „ „ - - 30 „ 45 „ „

Spanish coal is generally procurable at 5 to 10 per cent. below the price of British.

5. To a very limited extent, most British steamers bringing sufficient in bunkers to take them back to the United Kingdom.

6. The imports of coal and coke from Great Britain during the last ten years, are as follows:—

Year.	Tons.	Year.	Tons.
1894 - - -	52,934	1899 - - -	47,850
1895 - - -	64,000	1900 - - -	64,729
1896 - - -	58,432	1901 - - -	61,101
1897 - - -	58,552	1902 - - -	83,668
1898 - - -	35,412	1903 - - -	73,396

It is thus seen there is no falling off.

7. The railway rates are the same for foreign as for native coal.

8. The sale of British coal would undoubtedly increase if import duties were reduced and the traffic tax abolished.

9. No coal or coke is exported from this district.

10. The import duty on foreign coal is 2·50 Ptas. per 1,000 kilos. The traffic tax on same is 0·50 Ptas. per 1,000 kilos. The traffic tax on native coal carried coastwise is 0·15 Ptas. per 1,000 kilos.

TENERIFFE (Canary Islands).

Enclosure in dispatch, dated Teneriffe, 19th February, 1904, from Mr. John E. Croker, H.B.M.'s Consul at Teneriffe.

1. The quantity of coal imported per annum is about 230,000 tons. It is for steamer consumption, with the exception of about 4,000 tons used for domestic and manufacturing purposes.

2. South Wales, except in case of serious strike, when coal is obtained from the north of England and Scotland.

3. Twenty-five miles by cart, and occasionally by schooner round the coast.

4. 20s. to 29s. per ton, delivered from lighters—no railways in the Canary Islands.

5. About half of the coal imported is shipped for the bunkers of British vessels.

6. The imports of coal have increased during the past ten years.

7. No railways.

8. No. The coaling facilities are excellent.

9. There are no exports of coal from this district, except that shipped for steamers' bunkers.

10. Duty, 0·25 Ptas. per ton, which is considered reasonable by the merchants. The coal trade is entirely in British hands.

SWEDEN AND NORWAY.

CHRISTIANIA.

Enclosure in dispatch, dated Christiania, 16th February, 1904, from Mr. Edward F. Gray, H.B.M.'s Acting Consul-General at Christiania.

Note.—"I regret that it has been found impossible to obtain details as to the various descriptions of coal imported to Norway, as no record is apparently kept of the same. I am, however, informed that in future a separate record of the cokes imported to Norway will be kept by the Authorities.

"The American coal appearing in the Report in 1901 seems to have been an experimental order from the Naval Authorities, not subsequently repeated."

(*Extract from Mr. Gray's dispatch.*)

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1. A precise reply to this question cannot be given owing to the system of preparing official statistics hitherto prevailing in Norway, where all kinds of coal, cinders, and coke are included under one heading.

The present annual consumption of coal in Norway may, however, be roughly estimated at about one and a half million tons.

2. I am unable to discover any record of the sources of supply of coal imported to Norway in the sense of the names of the countries in which the coal was originally mined.

Table A, however, gives, as nearly as can be stated, the countries of shipment or immediate exportation by rail, and the approximate amounts of coal, cinders, and coke imported into Norway for the last ten years, for which particulars are so far available.

3. British coal is used at all stations on the Norwegian State Railways. It may thus be said to have practically penetrated to all parts of Norway where a demand for coal is likely to exist. Facilities for transportation—rail and steamboat.

4. I am informed that Norwegian coal importers nearly always buy f.o.b. the shipping port and secure the tonnage themselves, and that it is, practically speaking, only the State Railways who buy the coal delivered into railway trucks in the manner alluded to in this question.

Table B gives the highest and lowest prices paid by the Norwegian State Railways for British coal under these circumstances during each of the last ten years at each of the Norwegian ports of discharge. The State Railways have so far used British coal only, with the exception of one order in 1895 for 6,000 tons of briquettes from the "Société anonyme des charbonages du Hazard," Troaz, Belgium.

From the reply received from the State Railways, it would appear that the coal referred to in Table B was exclusively for locomotive use, and that practically no other coals were sold under similar circumstances, *i.e.*, delivered into truck. In case, however, they may be of interest, the following f.o.b. prices, which have been supplied me by a leading coal agent at Christiania, are added.

"For household purposes we import Scotch coals only, which are generally called Hamilton Ell. These coals sold in 1895 at 7s. to 8s., f.o.b., Glasgow, and the buyers have always the right to take out these coals sold in Grangemouth at 6d. per ton more. In 1896 the prices varied between 7s. and 7s. 8d. ; in 1897, 8s. 3d. to 7s. 9d. ; 1898, 9s. 6d. to 8s. ; 1899, 9s. to 9s. 6d., and 1900, 10s. to 16s. 7d. The years 1901, 1902, and 1903, have been almost the same as regards prices, varying between 9s. 6d. and 10s. 3d.—once, in 1902, 11s. 3d. f.o.b. Glasgow.

For machinery purposes we import English coals. We generally buy Newcastle coals. Davisons, Cowpen, or Bothal, which generally rule 1s. to 1s. 3d. per ton higher than the Scotch coals. In 1900 they went up to 19s. 9d.

All gas coke in Norway is imported from England.

5. Newcastle coals are, as a rule, also delivered as bunker coal, but it is impossible to say how much of the same has been shipped into British steamers. As a rule it is believed that foreign steamers take very little bunker coal out here, only enough to reach a British port.

6. A falling off in the imports of British coal, cinders, and coke will be noticed in Table A in 1901. This is regarded as attributable to the financial crisis in Norway about that date, and the consequent cessation of work in many factories.

The consumption of household coal and coke in Norway is always liable to be affected by the mildness or severity of the winter, and it is expected that the present winter's consumption will show a falling off.

7. The following are the railway rates chargeable on British coal in Norway in consignments of five tons and over :—

(*a*) For inland loads on the State Railways in the first, second, third, and fourth, and seventh districts, comprising the following lines — Christiania-Fredrickshald ; the frontier (with branch line Ski-Mysen and Sarpsborg), Christiania-Gjörik (with branch lines to Lillestrom, Kongsringer, the frontier Kongsringer to Flisen), Christiania, Drammen, and Skien, with branch line Drammen in Randsfjord and side line (Christiania-Eidesold), Hamar-Otta, Hamar-Trondhjem, Trondhjem-Meraker and the frontier and Hell to Levanger, with the Christiansand to Byglandsfjord Railway. Rates are calculated according to "Class 8."

The following Table gives the rate in öre per ton for the conveyance of goods under Class 8. (*denotes the distance) :—

"Constant."	Rate per Ton-Kilometre in öre for the part of the distance situated between :—			
	0–50 Kilometres.	51–100 Kilometres.	101–300 Kilometres.	Over 300 Kilometres.
50 öre	3·0 *	2·5 *	2·0 *	1·7 *

For instance, to convey a truck load of coal fifty kilometres the rates would be as follows :—

"Constant" (apparently a preliminary charge made before adding the rates per kilometre)	=	Kr. ·50
50 kilometres @ 3 öre per ton per kilometre	=	„ 1·50
Total cost per ton		Kr. 2·00

or about 2s. 2d. in British equivalent.

To calculate the cost of conveying a truck load of coal 100 kilometres, the following method would be employed :—

"Constant" - - - - -	Kr. 0·50
First 50 kilometres @ 3 öre per ton	„ 1·50
Next „ „ 2½ „	„ 1·25
	Kr. 3·25

Fractions of ten öre are, however, rounded off upwards to the next multiple to ten, so that Kr. 3·25 is rounded off to Kr. 3·30 (about 3s. 8d.) per ton, which gives the rate for 100 kilometres.

Again, taking 200 kilometres :—

"Constant" - - - - -	Kr.	0·50
First 50 kilometres (as above) -	,,	1·50
Next 50 ,, ,, -	,,	1·25
Next 100 ,, @ 2 öre per ton	,,	2·00
	Kr.	5·25
Rounded off upwards to	,,	5·30

(about 5s. 10d.) per ton, the rate for 200 kilometres.

Similarly, under the Table above given, the rates for conveying coal 300 kilometres would be Kr. 7·30 (about 8s.) per ton, for 600 kilometres Kr. 12·40 (about 13s. 8d.) per ton.

On the private railways in the first and fourth districts connected with the State Railway the same rates are charged as on the State Railway, except in the case of local traffic on the Main Railway. In the last-mentioned case, between Christiania and Eidsvold, the railway rates on coal are from Christiania to Lilleström (21 kilometres) Kr. 1.50 (about 1s. 8d.) per ton, and between Christiania and Eidsvold (68 kilometres) Kr. 3·10 (about 3s. 5d.) per ton.

On the State Railway between Stavanger and Egersund (District five), a distance of seventy-six kilometres, the railway rates on coal are 2½ öre per cent. with the addition of a "Constant" amount of seventy öre per ton or Kr. 2·60 (about 2s. 10d.) per ton for the entire distance,

On the State Railway between Bergen and Voss (District six), a distance of 108 kilometres, a zonal tariff exists, as follows :—

From Bergen to Nettum -	Kr.	1·50 (1s. 8d.)	per ton
From Bergen to stations from Heldal to Stanghelle - -	,,	2·00 (2s. 2d.)	,, ,,
From Bergen to stations from Dale to Bolstad - - -	,,	2·50 (2s. 9d.)	,, ,,
Bergen to Oranger - - -	,,	3·00 (3s. 4d.)	,, ,,
Bergen to Bolken and Noss -	,,	3·50 (3s. 10d.)	,, ,,

On the eighth district of the State Railway, including the lines from Narvik to the Swedish frontier, a distance of forty-three kilometres, loads of upwards of five tons of coal are charged as follows :—

From Narvik harbour to frontier - - - -	Kr.	2·70 (3s. 0d.)	per ton
From Narvik town to frontier	,,	2·50 (2s. 9d.)	,, ,,

And loads of upwards of eight tons :—

From Narvik harbour to frontier - - - -	Kr.	1·80 (2s. 0d.)	per ton
From Narvik town to frontier	,,	1·70 (1s.10½d.)	,, ,,

(b) Coal entering Norway by rail from abroad is chargeable under rates for direct goods traffic agreed upon with such foreign country.

In the case of through coal from Sweden, loads of at least five tons are reckoned under Tariff 8, and loads of at least eight tons under Tariff 11. When two lines take part in transport, the following rates per ton are charged :—

Distance. Kilometres.	Tariff 8.	Tariff 11.
100	Kr. 5·20 or 5s. 9d.	Kr. 3·80 or 4s. 3d.
200	,, 8·30 ,, 9s. 3d.	,, 5·70 ,, 6s. 4d.
300	,, 10·60 ,, 11s. 9d.	,, 7·20 ,, 8s. 0d.
500	,, 13·50 ,, 15s. 0d.	,, 9·80 ,, 10s. 11d.
800	,, 17·40 ,, 19s. 4d.	,, 13·70 ,, 14s. 10d.

If more than two lines take part in the transport, the rates are increased by fifty öre (6½d.) per ton for each additional line.

Coal from Denmark by rail is chargeable under Tariff 10 when of at least five tons ; when of at least eight tons, under Tariff 12, which is the lowest for through consignments from Denmark.

Coal from Germany is also chargeable according to lowest rates (Tariff D), on the condition that sender delivers the goods in consignments of at least five tons in truck.

The above-mentioned rates are the same for all kinds of coal, and there are no differential rates for British coal as compared with native coal or other imported coals.

8. It would be difficulty to make any suggestion as to how to increase the British coal trade in Norway, as this kingdom is regarded as "bound to take all the coal she requires from England or Scotland," except as regards foundry coke, which is procured mostly from Germany (Westphalia), and shipped from Dutch or German ports. I understand that no coals come to Norway from Belgium or Germany. The German foundry coke is considered better than the English, and it is also cheaper. Only a few cargoes of foundry coke—perhaps three or four small sailing vessels a year—are imported from Great Britain.

9. The exports of coal or coke from Norway are officially stated to be of no importance.

A statement, however, which can be regarded as fairly reliable, gives the amount of coal imported to Sweden for the Swedish State Railways by means of the Norwegian Ofoten Railway as 25,746 tons in 1903—the first year of the line working.

10. Impositions affecting the competitive power of British, as compared with other foreign countries' coal, do not appear to exist in Norway.

Among subjects which at a future date may affect the importation of British coal to this country may be mentioned the following :—

1. A proposal to employ electric-power from the Trollhättan falls in Sweden for the working of the State Railway between Cornsjö and Christiania.

2. The employment of electric-power on other Norwegian railway systems.

3. The partial employment of peat, to be mixed with locomotive coal, as is understood to be the case already in parts of Sweden.

4. The development of coal fields, believed to exist in Spitzbergen and Bear Island and to a small degree on the Island of Andöen—principally for mixing with steam coal and for use on steam whaling vessels.

The realization, however, of the above-mentioned projects must at present be regarded as problematical, partly owing to lack of capital to develop the water-power, peat deposits, and coal fields in question. The peat question is, however, attracting considerable attention ; and it is also understood that efforts are being made to obtain capital to develop the Bear Island deposits, where it is hoped that coal will be worth working below a depth of forty-five yards.

TABLE A.

Showing the approximate number of tons of coal, cinders, and coke imported to Norway during each of the years 1893–1902 *inclusive.*

Year.	Sweden.	Denmark.	Russia.	Germany.	Holland.	Belgium.	United Kingdom.	France.	Australia.	United States.	Canada.	Other countries.	Total.
1893	74·8	53·1	10·4	8,950·1	13,601·9	4,109·2	873,162·4	192·2	—	—	—	—	900,154·3
1894	—	133·8	—	9,554·8	12,045·7	3,353·	1,033,795·7	1,870·	—	—	—	—	1,060,753·2
1895	—	80·1	—	9,591·1	19,960·7	547·2	1,089,640·4	—	1,108·6	—	—	47·2	1,120,975·5
1896	203·2	—	—	10,244·1	15,636·5	214·9	1,103,594·3	5,825·9	278	—	—	—	1,136,087·2
1897	30·	—	—	6,675·1	7,881·4	20·	1,215,359·2	—	—	—	—	—	1,229,965·7
1898	6·8	·4	—	13,311·7	8,925·2	—	1,210,496·3	51·6	—	—	—	—	1,232,792·1
1899	141·1	97·6	—	14,405·9	14,423·2	503·2	1,447,539·6	968·8	—	—	—	—	1,478,079·6
1900	643·2	104·3	43·7	7,204·6	9,433·3	9·8	1,502,722·4	·1	—	—	—	·3	1,520,162·
1901	5·2	1·7	413·8	6,665·9	9,576·8	72·	1,393,530·3	—	—	2,962	—	—	1,413,227·9
1902	16·	2·	—	13,251·3	19,899·7	463·6	1,504,128·4	—	—	—	9,328	—	1,547,089·2

TABLE B.

Showing Highest and Lowest Prices for British coal delivered into railway trucks alongside vessels in Norway, at each of the undermentioned ports for the last ten years.

Port of Discharge.	1894.		1895.		1896.		1897.		1898.		1899.		1900.		1901.		1902.		1903.	
	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Christiania (East) -	13 7½	13 5	14 6	12 5½	12 1¾	11 7	14 5	12 4¾	13 5	12 7¾	18 6	17 5	29 6	21 0	16 0	16 0	16 6	16 5	16 1¾	15 9½
Do. (West) -	13 2	13 2	12 3	12 3	11 11½	11 11½	12 2	12 2	12 6¼	12 6¼	17 4	17 2½	24 3	22 7½	15 11½	15 11½	16 5	16 3¾	16 0½	16 0½
Fredrikshald - -	13 4	13 4	12 5	12 5	12 3	12 3	12 4	12 4	12 10	12 10	17 6	17 3	23 0	22 2	16 6	16 6	17 2	17 2	16 9	16 9
Drammen - -	13 10½	13 9	12 8	12 7	12 4½	11 8¼	12 10½	12 10½	13 10	13 0½	17 9	17 2	23 8	22 11	16 2½	16 2½	16 6	16 5	16 2½	16 2½
Holmestrand - -	13 1	13 1	11 11	11 11	11 10	11 10	12 0	12 0	12 2½	12 2½	17 6	17 6	21 11	21 11	16 6	16 6	16 9	16 9	16 6	16 6
Tönsberg - - -	—	—	—	—	—	—	12 4	12 4	—	—	—	—	—	—	15 11	15 11	—	—	—	—
Laurvig - - -	13 1	13 1	11 11	11 11	11 3	11 3	11 8	11 8	11 9	11 9	13 11	13 11	22 9	22 9	15 0	15 0	16 6	1– 6	16 2	16 2
Skien - - -	13 1	13 1	11 9	11 9	11 3	11 3	11 8	11 8	11 9	11 9	17 9	16 6	23 9	23 0	15 4	15 4	16 0	16 0	15 10	15 10
Trondhjem - -	13 11	13 11	12 9	12 9	12 7	12 7	12 11	12 11	13 0½	13 0½	17 9	16 9	24 9	24 6	17 1	16 6	16 11½	16 11½	16 3½	15 9½
Hommelvik - -	13 11	13 11	12 9	12 9	12 7	12 7	12 11	12 11	13 0½	13 0½	17 9	17 9	24 9	24 9	17 1	17 1	16 11½	16 11½	16 3	16 3
Bergen - - -	13 10	13 10	12 6½	12 6½	12 4½	12 4½	12 11	12 11	12 10	12 10	17 2	17 2	22 11	22 11	16 6	16 6	17 1½	17 1½	17 0½	17 0½
Stavanger - - -	14 11	14 11	13 8	13 8	13 3	13 3	13 5	13 5	13 8	13 8	19 6	18 0	24 0	24 0	16 9	16 9	16 6	16 6	17 0	17 0
Egersund - - -	14 11	14 11	13 8	13 8	13 6	13 6	13 11	13 11	13 11½	13 11½	19 6	19 6	24 0	24 0	17 0	17 0	16 10	16 10	17 3	17 3
Flekkefjord - -	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	18 6	18 6	—	—
Christiansand (S) -	—	—	13 0	13 0	12 5	12 5	—	—	12 8	12 8	17 6	17 6	24 6	24 6	16 3½	16 3½	16 6	16 6	16 6	16 6
Narvik - - -	—	—	—	—	—	—	—	—	—	—	—	—	27 6½	27 6½	19 3	19 3	16 11	16 11	16 5½	16 5½

GOTHENBURG.

Extract from dispatch, dated Gothenburg, 5th February, 1904, from Mr. John Duff, H.B.M.'s Consul at Gothenburg.

1. The present consumption of coal per annum in this district is 736,105 tons, of which fifteen per cent. is used for domestic purposes and eighty-five per cent. for manufacturing and steam purposes.

2. Great Britain and Sweden are the sources of supply, chiefly the former country.

3. British coal has penetrated to all parts of the country by rail and inland waterways.

4. The prices obtained for Northumberland, Durham, and Scotch coals, which are the kinds of coal chiefly imported, were

	s.	d.		s.	d.
In 1894 - - -	15	8		—	
„ 1895 - - -	14	0	to	14	8
„ 1896 - - -	14	0		—	
„ 1897 - - -	14	8		—	
„ 1898 - - -	14	0		—	
„ 1899 - - -	16	8	„	17	4
„ 1900 - - -	18	8	„	22	8
„ 1901 - - -	16	8	„	17	4
„ 1902 - - -	17	4	„	18	0
„ 1903 - - -	16	8	„	17	4

per ton on railway trucks alongside vessels. The prices of Swedish coal are regulated by the English market and are generally 3s. 10d. to 4s. 6d. per ton below the prices obtained for British coal.

5. No British coal imported into this district is shipped for bunkers of British vessels.

6. The import of British coal to this port is increasing, and was greater in 1903 than in any previous year; but the import of British coke has fallen off owing to the production of this article here, and the import of Westphalian coke, which appears to be gaining ground.

7. The railway rates, which are moderate and equal for all kinds of coal, are calculated according to quantity and distance.

8. I have no suggestion to make as regards the increase of the British coal trade of this district.

9. There are no exports of coal or coke from this district.

10. There are no import duties or impositions affecting the British coal trade; but native peat fuel is now being used largely, and will, I fear, in time, prove a competitor to British coal in this country.

STOCKHOLM.

Enclosure in dispatch, dated Stockholm, 30th January, 1904, from Mr. A. Stewart MacGregor, H.B.M.'s Consul at Stockholm.

NOTE.—"From the particulars obtained, it will be seen that, with respect to sources of supply, by far the greater part of the coal consumed in this country comes from Great Britain, and that as regards the quantity imported, it has, during the last ten years, more than doubled itself."—(*Extract from Mr. Consul A. Stewart MacGregor's dispatch.*)

1. According to the returns at present available, about 3,520,083 tons (42,241,000 hectolitres) of coal and coke were imported into Sweden in 1903.* Coal and coke are, in the said returns, quoted under the same heading, but official statistics are expected about the end of this year (1904), and in them each will be shown separately. No official record is kept of the quantity used for domestic purposes as distinguished from that employed in manufacturing or steam purposes.

The following Table shows the amount of coal (not including coke) imported into Sweden from 1893 to 1902 inclusive:—

Year.	Tons.	Hectolitres.
1893	1,573,745	19,396,800
1894	1,931,903	24,148,786
1895	1,911,629	23,895,370
1896	1,991,760	24,896,994
1897	2,240,247	28,003,094
1898	2,392,451	29,905,639
1899	3,047,618	38,095,220
1900	3,033,885	37,923,562
1901	2,793,309	34,216,358
1902	3,032,589	36,391,072

Rate of Exchange:—1 ton equal to 12 hectolitres.

2. With the exception of a few cargoes from the United States of America, and a very small quantity from Westphalia, Great Britain has supplied the total quantity.

3. Right through the whole country, by rail and waterways.

4. See following Tables:—Prices of coal and coke purchased for the Swedish State Railways. These statistics are obtainable only for the years 1900–1903 inclusive, but are of special interest from the fact that Swedish coal importers will not make their annual purchases until they know the prices paid by the representatives of the State Railways. These prices are made public and form the basis upon which contractors draw up their contracts.

5. Undoubtedly a small portion of the British coal imported is afterwards resold to British vessels for bunker purposes, but no figures can be given.

6. The quantity has more than doubled itself during the last ten years. Slackness in trade and high coal prices caused a decrease between 1900 and 1901, but this fact is considered without importance.

7. The same railway rates are charged for both Swedish and foreign coals.

These rates, on the Swedish State Railways, are:—

For coals in quantities of at least 8,000 kilogrammes (8 tons) and upwards for a distance of

Kilometres.	Miles.	Öre.	Pence.
	About.	*Per 100 Kgs.*	*About.*
50	31,069	20	$2\frac{2}{3}$
100	62,138	28	$3\frac{3}{4}$
150	93,207	37	5
200	124,276	44	$5\frac{9}{10}$
250	155,345	51	$6\frac{8}{10}$
300	186,414	57	$7\frac{6}{10}$
350	217,483	64	$8\frac{1}{2}$
400	248,552	70	$9\frac{1}{3}$

8. It is said here that the trade in British coal can best be maintained and increased by keeping prices at a reasonable level. This is deemed advisable in order to prevent the use of peat, which, when coal-prices are high, is here greatly recommended as a native substitute for foreign fuel. The peat industry is reported to be improving and increasing yearly.

9. Welsh anthracite in small quantities is exported to Finland.

10. In Sweden there is no import duty on coal.

*As regards 1903 the figures are only approximate.

ANSWERS TO QUESTION 4.

PRICES (PURCHASE) OF COAL AND COKE FOR THE SWEDISH STATE RAILWAYS FOR THE YEAR 1900.

Place.	Agent.	Tons.	Price.	Kind of Coal.
			s. d.	
Locomotive Coal.				
Stockholm	Olson & Wright	5,000	23 11	West Hartley Main.
„	Forsberg & Mark	12,000	23 11	„ „
„	John Hudson & Co.	5,000	24 2¾	Lambton.
„	„ „	10,000	24 5¾	„
„	Olson & Wright	10,000	24 8	„
„	Charles E. Evans & Co.	17,000	29 7	Nixons Navigation.
Göteborg	August Carlson & Co.	15,000	20 3	Lambton; Bothal, Davisons, Cowpen à 19s. 11d.
„	„ „	5,000	23 6	Mitchells, Manvers, Kilnhurst, Haughton, Cortonwood, Darfield Main.
„	Wilson & Co.	3,000	24 0	Aldwarke, Wombwell, Mitchell, Manvers, Hickleton, Darfield Main.
„	Charles E. Evans & Co.	6,000	29 4	Nixons Navigation.
Varberg	—	—	—	
Halmstad	Carl R. Matton	6,000	25 10½	Aldwarke.
Helsingborg	„ „	10,000	26 0	„
Malmö	E. Wiener & Co.	5,000	23 5½	Lambton; Bothal 23s. 1½d.
„	„ „	6,200	23 10	„ „ 23s. 6d.
„	Wm. C. Bradley	10,000	25 6	Aldwarke, Wombwell, Mitchell, Denaby, Hickleton, Manvers Main.
„	Morgan, Wakley & Co.	1,000	31 3	Nixons Navigation.
Norrköping	Olson & Wright	15,000	24 5	West Hartley Main.
Stugsund	Wm. Milburn & Co.	20,000	22 11	Lochgelly, Cowdenbeath.
Hudiksvall	Andrew Leitch & Co.	6,000	25 0	„ „
Sundsvall	Wm. Milburn & Co.	20,000	22 10	„ „
Örnsköldsvik	„ „	10,000	23 5	„ „
Luleå	E. Wiener & Co.	3,800	23 7	Lambton; Bothal 23s. 3d.
„	G. & L. Beijer	10,000	24 4	Bowhill.
„	„ „	18,000	24 4	Cowdenbeath, Lassodie.
„	„ „	5,000	24 6	Lochgelly.
„	Geo. Pyman & Co.	10,000	24 6	Bothal, Davisons, Hastings, Compen, West Hatley Main.
„	G. & L. Beijer	10,000	25 0	Bothal.
Hommelvik	Chr. Salvesen & Co.	10,000	23 6	Lochgelly, Cowdenbeath. Fritt å vagn.
Smithy Coals.				
Stockholm	Andersson & Lindberg	500	22 6	Thrislington, North Brancepeth.
Göteborg	Wilson & Co.	400	20 3	South Hetton.
Malmö	Andersson & Lindberg	400	22 6	Thrislington, North Brancepeth.
Luleå	Mackenzie & Pyhlson	350	23 8	South Hetton.
Anthracite Coal.				
Stockholm	G. & L. Beijer	200	31 0	Great Mountain.
Göteborg	Carl Schlyter	800	26 6	Sunrise.
Malmö	„ „	300	27 0	„
Sundsvall	„ „	900	27 0	„
Luleå	„ „	600	28 0	„

FOR THE YEAR 1901.

Place.	Agent.	Tons.	Price. s.	Price. d.	Kind of Coal.
		Locomotive Coal.			
Stockholm	G. & L. Beijer	20,000	15	1¾	Bothal, Davisons, Hastings, Cowpen, West Hartley Main (Feb.-April).
„	Robert Thorman	5,000	15	8	Bothal, Davisons, Hastings, Cowpen, West Hartley Main.
„	„ „	5,000	16	0	Lambton.
„	Wilson & Co.	28,000	16	1	„
„	Powley, Thomas & Co.	7,000	21	9	Nixons Navigation, Penrikyber, National Merthyr, Lockets Merthyr, Ferndale.
Göteborg	Wilson & Co.	7,500	15	1	Lambton (Feb.-March).
„	„ „	46,000	15	4	„
„	Forsberg & Mark	8,000	18	6	Aldwarke-, Wombwell-, Mitchell-, Manvers-, Denaby-, Hickleton-, Darfield-, Carlton-, Wolley Main.
„	J. Andersson	2,000	21	4	Nixons Navigation, Penrikyber, National Merthyr, Lockets Merthyr, Ferndale.
Varberg	———	—	—		
Halmstad	Carl R. Matton	5,000	19	6	Aldwarke Main.
Helsingborg	Nils Thestrup & Co.	5,000	19	0	Aldwarke-, Wombwell-, Mitchell-, Manvers-, Denaby-, Hickleton-, Darfield-, Carlton-, Wolley Main.
„	Pyman, Bell & Co.	7,000	19	2	Manvers-, Denaby-, Hickleton Main.
Malmö	G. & L. Beijer	6,000	15	1¾	Bothal, Davisons, Hastings, Cowpen, West Hartley Main (Feb.-April).
„	E. Wiener & Co.	7,000	15	9	Lambton: Bothal 15s. 5d.
„	„ „	3,000	15	10	„ Bothal 15s. 6d.
„	Pyman, Bell & Co.	10,000	19	0	Manvers-, Denaby-, Hickleton Main.
„	Emil Flensburg	2,000	21	9	Nixons Navigation, Penrikyber, National Merthyr, Lockets Merthyr, Ferndale.
Norrköping	Green, Holland & Sons	15,000	16	2½	Bothal, Davisons, Hastings, Cowpen, West Hartley Main.
Stugsund	„ „ „	10,000	16	3½	Bothal, Davisons, Hastings, Cowpen, West Hartley Main.
„	John Hudson & Co.	3,000	16	4	Lambton, Randolph.
„	„ „ „	5,000	16	4½	„ „
Hudiksvall	Pyman, Bell & Co.	6,000	16	9	„
Sundsvall	Mackie, Koth & Co.	10,000	16	1½	Lochgelly, Cowdenbeath.
„	„ „ „	6,000	16	1½	„ „
„	John Hudson & Co.	4,000	16	4	Lambton, Randolph.
„	„ „ „	5,000	16	4½	„
„	J. Andersson	3,000	22	2	Nixons Navigation, Penrikyber, National Merthyr, Lockets Merthyr, Ferndale.
Örnsköldsvik	Burns & Lindemann	6,000	16	0	Bowhill.
„	„ „	7,000	16	3	Lochgelly, Cowdenbeath.
„	E. Wiener & Co.	5,000	16	6	Lambton; Bothal, 16s. 2d.
Luleå	Robert Thorman	10,000	16	0	Lochgelly, Cowdenbeath.
„	„ „	3,000	16	0	„ „
„	C. A. Blom & Co.	10,000	16	6	Lambton; Bothal, Davisons, Hastings, Cowpen, 16s. 2d.
„	D. M. Stevenson & Co.	20,000	16	1½	Lochgelly, Cowdenbeath.
„	„ „ „	20,000	16	3	„ „
Hommelvik	A. Selmer & Co.	5,000	16	9	Bowhill. Fritt å vagn.
„	„ „	5,000	17	1½	Lochgelly, Cowdenbeath. „ „ „
		Smithy Coal.			
Stockholm	Andersson & Lindberg	350	17	0	Thrislington, South Durham.
Göteborg	„ „	600	16	3	„ „
Malmö	„ „	450	17	6	„ „
Sundsvall	„ „	100	18	0	„ „
Luleå	Carl Schlyter	300	21	5	Silksworth, South Hetton, Thrislington, North Brancepeth.
		Anthracite Coal			
Stockholm	Gustaf L. Ahlström	500	28	0	Evans United Nuts.
Göteborg	Carl Schlyter	800	27	3	Sunrise.
Malmö	Gustaf L. Ahlström	400	28	3	Evans United Nuts.
Stugsund	Carl Schlyter	300	29	9	Sunrise.
Sundsvall	„ „	900	28	3	„
Luleå	„ „	650	29	3	„

FOR THE YEAR 1902.

Place.	Agent.	Tons.	Price.		Kind of Coal.
			s.	d.	
Locomotive Coal.					
Stockholm	G. & L. Beijer	50,000	15	11¾	Bothal, Davisons, Cowpen; Lambton, 16s. 3¾d.
,,	Gibson & Grönberg	10,000	15	9	Lambton, Bothal, Davisons, Cowpen.
,,	Pyman, Watson & Co.	5,000	19	4	Nixons Navigation, Penrikyber, Natonal Merthyr, Lockets Merthyr, Ferndale.
Göteborg	Wilson & Co.	7,500	14	10	Lambton.
,,	,, ,,	36,500	15	8	,,
,,	Forsberg & Mark	10,000	15	7	,,
,,	A. Johnson & Co.	6,000	16	–	Canadensiska.
,,	John Brown & Co.	3,000	16	10	Aldwarke Main.
,,	Pyman, Watson & Co.	3,000	19	2	Nixons Navigation, Penrikyber, National Merthyr, Lockets Merthyr, Ferndale.
Varberg	G. & L. Beijer	5,000	17	1½	Aldwarke, Wombwell-, Mitchell-, Manvers-, Denaby Main, Thrybergh, Staveley.
Halmstad	John Brown & Co.	10,000	17	7	Aldwarke Main.
Helsingborg	,, ,, ,,	10,000	17	4	,, ,,
,,	G. & L. Beijer	10,000	17	4½	Aldwarke-, Wombwell-, Mitchell-, Manvers-, Denaby Main, Thrybergh.
Malmö	E. Wiener & Co.	8,750	16	3	Lambton; Bothal, 15s. 11d.
,,	,, ,, ,,	3,750	16	4½	,, ,, 16s.
,,	Emil Flensburg	5,000	16	2½	Bothal, Davisons, Cowpen.
,,	G. & L. Beijer	5,000	16	10½	Aldwarke-, Wombwell-, Mitchell-, Manvers-, Denaby Main, Thrybergh, Staveley.
,,	,, ,, ,,	10,000	17	4½	Aldwarke-, Wombwell-, Mitchell-, Manvers-, Denaby Main, Thrybergh.
Norrköping	,, ,, ,,	25,000	16	5	Bothal, Davisons, Cowpen; Lambton, 16s. 6d.
Stugsund	John Hudson & Co.	2,500	15	4¼	Lambton, Randolph.
,,	,, ,, ,,	10,000	16	7	Lambton.
,,	Mackenzie & Pyhlson	5,000	15	10	Lambton, Randolph.
Hudiksvall	Andersson & Lindberg	8,000	16	–	Lochgelly, Cowdenbeath.
Sundsvall	Mackie, Koth & Co.	15,000	15	1½	,, ,,
Ornsköldsvik	John Smith & Son	5,000	15	–	,, ,,
Luleå	,, ,, ,,	10,000	15	–	,, ,,
,,	D. M. Stevenson & Co.	45,000	15	1½	,, ,,
Hommelvik	Mackie, Koth & Co.	8,000	15	8	,, ,,
Smithy Coal.					
Stockholm	Gibson & Grönberg	800	15	–	South Hetton, Thrislington, South Durham, North Brancepeth.
Göteborg	,, ,, ,,	500	14	6	
Malmö	,, ,, ,,	450	14	9	
Sundsvall	,, ,, ,,	100	14	9	
Luleå	,, ,, ,,	150	15	3	
Anthracite Coal.					
Stockholm	A.-B. Stockholms Kol-import.	700	27	9	Emlyn, Gwaun Cae Gurwen, Pontyberem.
Göteborg	Carl Schlyter	500	27	3	Sunrise.
Malmö	A.-B. Stockholms Kol-import.	400	28	–	
Stugsund	,, ,, ,,	100	29	6	Emlyn, Gwaun Cae Gurwen, Pontyberem.
Sundsvall	,, ,, ,,	600	27	8	
Luleå	,, ,, ,,	250	28	9	

FOR THE YEAR 1903.

Place.	Agents.	Tons.	Price.	Kind of Coal.
			s. d.	
	Locomotive Coal.			
Stockholm	Wm. Milburn & Co.	10,000	15 8½	Bothal, Davisons, Cowpen.
„	„ „ „	20,000	15 9	„ „ „
„	„ „ „	30,000	15 10	„ „ „
„	Evans & Reid	5,000	19 2	Nixons Navigation, Penrikyber, National Merthyr, Lockets Merthyr, Ferndale.
Göteborg	Wilson & Co.	5,000	15 5	Lambton, (skeppn. Febr.—March).
„	Aug. Carlson & Co.	10,000	15 3½	Bothal; Lambton 15s. 7½d.
„	Bessler, Waechter & Co.	20,000	15 6	Bothal, Davisons; Lambton 15s. 10d.
„	Wm. Mathwin & Son	10,000	15 8	Lambton, Bothal, Davisons, Cowpen.
„	John Brown & Co.	3,000	16 8	Aldwarke Main.
Varberg	„ „ „	5,000	17 4	„ „
Halmstad	„ „ „	5,000	17 2	„ „
Helsingborg	„ „ „	5,000	17 0	„ „
Malmö	Wm. Milburn & Co.	15,000	15 8½	Bothal, Davisons, Cowpen.
„	John Brown & Co.	10,000	17 2	Aldwarke Main.
„	T. Beynon & Co.	3,000	19 2	Nixons Navigation, Penrikyber, National Merthyr, Lockets Mertdyr, Ferndale.
Norrköping	Olson & Wright	20,000	15 6½	West Hartley Main.
Stugsund	Burns & Lindemann	20,000	15 6	Lochgelly, Cowdenbeath; Bowhill 15s. 3d.
Hudiksvall	Andersson & Lindberg	8,000	15 9	„ „
Sundsvall	Carl Schlyter	9,000	15 2½	„ „
„	„ „	5,000	15 1	„ „
Örnsköldsvik	Bessler, Waechter & Co.	10,000	15 4	„ „
Luleå	Kirkpatrick & Barr	20,000	15 1	„ „
„	Pyman, Bell & Co.	30,000	15 1½	„ „
Hommelvik	Albr. V. Selmer	8,000	15 7	„ „ Free on railway wagons.
Vid Narvik	Bernh. Brekke	15,000	16 10½	„ „ Free on railway wagons at the frontier (from Norway).
	Smithy Coal.			
Stockholm	Andersson & Lindberg	800	15 0	South Durham, Thrislington.
Göteborg	Aug. Carlson & Co.	300	14 7½	South Durham, Thrislington, South Hetton, Silksworth, North Brancepeth.
Malmö	Fawcitt & Co.	500	14 11	South Durham, Thrislington.
Stugsund	John Hudson & Co.	300	14 10	South Durham, South Hetton, North Brancepeth.
Luleå	Mackenzie & Pyhlson	500	15 2	South Durham, South Hetton, North Brancepeth, Silksworth, Thrislington.
	Anthracite Coal.			
Stockholm	Carl Schlyter	500	28 0	Sunrise.
Göteborg	C. Uggla & Co.	400	28 0	„
Malmö	Carl Schlyter	1,000	28 0	„
Stugsund	„ „	1,000	28 3	„
Luleå	„ „	1,000	28 9	„

SWITZERLAND.

GENEVA.

Extract from dispatch, dated Geneva, 4th March, 1904, from Sir George Phillippo, H.B.M.'s Consul at Geneva.

1. The consumption of coal in the Canton of Geneva is unknown. I can only send the return from the Customs of the quantity imported into Switzerland. For domestic purposes, a large quantity of wood is used. For manufacturing or steam purposes, the only information I have is that contained in the letters from the director of the gas works, and from Mr. Pagnet.

2. The only information I can get is contained in the return from the Customs, and relates to the whole of Switzerland.

3. I am unable to answer, very little British coal having penetrated into this neighbourhood.

4. Not having a sea-port all coal is delivered at the railway station.

5. No British coal imported in my district is afterwards shipped into British vessels.

6. Very little British coal has been imported into this district, and that only spasmodically. There is, therefore, no means of making a comparison.

7. There are no special rates. Each party makes his own arrangement, but purchasers insist on coal being delivered to them in Geneva free of cost of transport, etc., and it is the sellers that make the arangement for the transport, not the purchaser. British coal, when brought into the district, is usually obtained in small quantities, and generally procured from Nantes, Marseilles, Bordeaux or St. Nazaire.

8. The coal trade cannot be increased unless British coal can be delivered at the railway station in Geneva at a price which would compare favourably with German and French coal. Even then, it could not compete with German coal, unless the same means were used to push the sale and the same facilities given for payment.

9. There is no export of coal or coke from my district.

10. The import duty on coal is 2 centimes per "quintal métrique"=1 cwt. 3 qrs. 27·7 lbs.

The price of German coal, delivered at the railway station, Geneva, varies from Fr. 35 to Fr. 45, and that of French coal, from Fr. 30 to Fr. 40 per "Tonne française"—1,000 kilogrammes or 2,204·62 lbs. avoirdupois.

German coal is most in demand for breweries and hotels, whilst French coal serves principally for industrial purposes and steamers. English coal is considered the best for distilling gas, and has lately been purchased for Fr. 36·50 per "Tonne francaise." There are, however, no travellers to push the sale of British coal, while several French mines have their own depots at Geneva; and besides these several travellers come round periodically for French coal, and many more for German coal. German coal is superseding French coal, because the German coal-dealers are more accommodating than the French. While the French insist on being paid within thirty days, or at most within three months, some of the German coal-dealers give half a year's credit.

Replies of Mr. Pagnet.

1. I enclose a statement from the Swiss Customs.

The following are the figures of the Importation of fuel in 1902 *for the whole of Switzerland. The figures for Geneva are not known.*

	Germany.	France.	Belgium.	Great Britain.	Austria.	Netherlands.	Importation to the Depôt.
Coal	11,526,559	1,424,003	832,528	133,344	45,036	13,550	29,981
Lignite	115	298	—	—	44,265	—	188
Coke	1,124,001	306,472	5,663	4,687	539	Italy. 5,593	209
Briquettes	2,769,288	160,035	476,597	336	5,145	—	4,842

SUMMARY.

Coal	14,005,001	quintaux	métriques
Lignite	44,866	„	„
Coke	1,447,164	„	„
Briquettes	3,416,243	„	„

Out of that quantity 27,741 French tons (1 ton—1,000 kilos.) are used for the manufacture of gas which is distilled from the coals of the Loire and the Nord in equal parts.

Another large consumer is the Compagnie Générale de Navigation on Lake Léman, which uses about 10,000 tons of briquettes from Gard.

Then follow the breweries:—

St. Jean, 4,000 tons of Sarrebrück.
Les Pâguis, 2,000 tons of Sarrebrück and Britquettes.
Caronge, 1,500 tons Briquettes.
Tivoli, 2,000 tons Britquettes.

2. See the above Table. The only variation has been about four years ago during the time of the strikes in the Loire and of the Gars. At that time Scotch coal was imported viâ Bordeaux or St. Nazaire.

3. Besides the case mentioned in No. 2, I believe that Geneva is the only Swiss town using Cardiff coal (about forty tons) viâ Marseilles; the other British coals which come in are Scotch.

4. The Scotch coals which came four years ago cost Fr. 25 a ton loaded on a wagon at Bordeaux or St. Nazaire and were sold by the French houses which have depôts in these two towns.

7. The transport from Marseilles to Geneva is Fr. 14 the ton; Bordeaux to Geneva, Fr. 15·90 the ton; and St. Nazaire to Geneva, Fr. 15·90 the ton.

8. As the customers in the city require large coal free from small, the sale of British coal is rendered difficult by the discharging from the vessels which causes a good deal of loss. It is for that reason that it is necessary to deal through an established house, whether it be at Marseilles for Cardiff, or at Bordeaux or St. Nazaire for Scotch coal. This inconvenience does not exist in the case of the gas works, and it is, I believe, in this direction that the sale of British coals ought to be pushed. As they are the greatest consumers, the importation of a large tonnage would, no doubt, enable them to obtain reductions in the cost of transport. This has been the case of the coal from the Nord which is actually brought to Geneva in competition with the coal from the Loire.

Extract from a letter from the Director of the Gasworks, dated Geneva, 20th February, 1904.

The amount of coal used in the gas works during the last seven years was:— kilos.

1896	23,934,410
1897	24,567,940
1898	25,850,740
1899	26,650,010
1900	28,721,460
1901	25,522,610
1902	26,685,870
1903	27,741,870

The largest part of the coal is obtained from French mines, amongst these are the Company of Mines in the neighbourhood of St. Etienne (Loire) which furnishes the greatest supply of coal. We also purchase in the north of France (Mines de Courrières, de Liévin, de Béthune) and in l'Aveyron (Mines d'Aubin).

The carriage of coal from St. Etienne to Geneva costs Fr. 9·10 (including statistic charges, customs, etc.) This is the lowest rate that we pay for the mines which are nearest to us; the other mines can only compete by

reducing their prices so as to compensate for the high cost of transport which the distance from us imposes. It is precisely the cost of carriage which has prevented the English coal penetrating to us in the regular way. We have only been able to buy when the price of coal at St. Etienne has been high (in the years 1900 and 1901), or in a case of strikes in the French coal fields.

We must also notice the competition of the German mines, especially coal from the Saar (Königliches Bergamt, Saarbrücken), which distills much more rapidly than the French or English coal, and which, from that point of view, offers an appreciable advantage. The carriage of Heinitz coal, for example, of which we purchase a small quantity costs Fr. 17·80 ; that is a very high price, which renders it difficult for German coals to get to us. We have, during recent years, purchased a small quantity of coal from Saar because of the advantages which this coal offers.

As far as English coal is concerned, we have rarely bought because the price at which the coal can be obtained at Geneva is far too high.

In 1899 we obtained some English coal " Lambton " at a cost of Fr. 35 the ton delivered at Geneva. That coal came to Nantes where the supplier had a depôt. We bought that same coal for Fr. 36·50 in 1901-1902.

The firm of Worms & Co. at Marseilles offered us, in November, 1902, some English coal from Wearmouth at Fr. 36 the ton delivered at Geneva.

In the autumn of 1903 a merchant at Zurich offered us " Norrfield Silkstone Gas Coal," at a price of Fr. 21 the ton at Mannheim. The carriage costs Fr. 15·30 which would bring the total cost of the coal to Fr. 36·30 the ton at Geneva.

We were offered in November, 1903, some so-called Superior English Gas Coal from Pelaw-Main at Fr. 35 the ton at Geneva. We must note that the actual cost of coal from the neighbourhood of St. Etienne is from Fr. 29 to Fr. 30 per ton at Geneva.

According to the statistics of the Swiss Gas Works for the year 1902 there are only the works at Bâle and of Schaffhouse which have bought English coal. It is always the question of the carriage which plays the most important part.

In answer to your question about the exportation of fuel, as for coal, there is naturally no export, as Switzerland produces no coal ; and so far as coke is concerned, a certain quantity has to be imported each year to Geneva, either hard metallurgical coke, or gas coke, because the production of the gas works at Geneva is not sufficient for the consumption. To sum up, as far as gas coal is concerned, we believe that the principal obstacle to the consumption of English coals is the question of price. The cost of carriage from England to Geneva is too high, because the actual conditions of sale of the English coal at Geneva do not permit of the consumption of that coal.

LAUSANNE.

Extract from dispatch, dated Lausanne, 18th January, 1904, from Mr. A. Galland, H.B.M.'s Consul at Lausanne.

It is not possible to obtain from the Customs authorities here any precise information concerning the present consumption of coal per annum, in this Consular district. They can only refer me to the importation figures published yearly by the " Bureau des Statistiques " at Berne.

For the year 1902 these figures were as follows :—

		Metric Quintals (= 100 kilos).
Coals imported from	Germany - - -	11,526,559
,, ,,	Austria - - -	45,036
,, ,,	France - - -	1,424,003
,, ,,	Belgium - - -	832,518
,, ,,	Netherlands - -	13,550
,, ,,	England - - -	133,344

It seems that the station masters at the Swiss frontier communicate the figures of importations direct to Berne, and are not required to mention in their reports the origin of the goods, nor the destination of same. The head of the Customs here, therefore, ignores any information until it is published by the ' Bureau des Statistiques,' and he is not in a position to know what proportion of the coal importations may be allowed to this district. I have, however, obtained from the largest dealer in coals at Lausanne an approximate estimation which is :—

Yearly consumption for the Canton of Vaud (mostly of German, French, and Belgian origin), 18 to 20,000 trunks of 10,000 kilos. each.

Yearly consumption for the Canton du Valais (of same origin) 5 to 6,000 trunks of 10,000 kilos. each.

These figures only include quantity used for domestic purposes ; the consumption for railways, gas factories, and others cannot be easily estimated.

The same dealer says that, probably owing to the heavy cost of transport, British coals are not used in this part of Switzerland. The only consumer he knows is Nestlé's Company, who order yearly four or five trunks of British coals.

The Swiss import duty on coal is two centimes per 100 kilos.

There are no exports from this district.

ZURICH.

Enclosure in dispatch, dated Zurich, 27th January, 1904, from Mr. H. Angst, C.M.G., H.B.M.'s Consul-General at Zurich.

Answers drawn up by Mr. J. C. Milligan, British Commercial Agent.

1. It is not possible to give the consumption of coal per annum in my Consular district, as no separate returns are given by the Customs Authorities, but only the aggregate importation into the whole of Switzerland. The importation of coal and coke in 1901 and 1902 was as follows (the returns for 1903 are not yet published) :—

	1901 Tons.	1902 Tons.
Coal - - - - - -	1,364,600	1,372,500
Coke - - - - - -	148,600	142,100

No returns are given stating separately the quantity used for domestic, manufacturing, and steam purposes.

In addition to the importation of coal and coke, a considerable quantity of briquettes (made from a medium coal between turf and pit-coal, which comes principally from Austria) are annually imported, which can only be used for domestic purposes. In 1902 the importation of these briquettes amounted to 335,000 tons, or equal to nearly one-fourth of the total importation of coal. There are also some anthracite coal mines in the Rhone Valley in Switzerland. No reliable statistics are obtainable regarding the total output of coal from these mines, but the quantity is not large.

2. The following have been the foreign sources in each year during the last ten years up to the end of 1902 (the returns for 1903 are not yet published). The average values given are those fixed by the Federal Customs for the purpose of estimating the value of the importation of coal and coke :—

Imports of Coal.

Year.	Total Imports.	Customs Average Value per ton.	Germany.*	France.	Belgium.	Great Britain.	Other Countries.
	Tons.	s. d.	Tons.	Tons.	Tons.	Tons.	Tons.
1893.	918,000	23 9	694,400	120,000	92,200	5,400	6,000
1894.	971,300	24 3	731,800	135,300	93,200	5,400	5,600
1895.	1,061,300	24 3	778,200	156,700	113,700	5,700	7,000
1896.	1,136,700	25 1	846,000	161,000	115,700	6,000	8,000
1897.	1,196,300	21 7	895,000	163,000	124,300	6,500	7,500
1898.	1,308,300	21 8	1,017,000	159,800	119,000	7,000	5,500
1899.	1,381,200	23 9	1,093,000	164,800	104,300	10,900	8,200
1900.	1,516,600	26 7	1,185,300	178,100	121,200	23,000	9,000
1901.	1,364,600	26 7	1,104,800	129,200	109,200	14,600	6,800
1902.	1,372,500	23 8	1,132,000	139,900	81,800	13,000	5,800

Imports of Coke.

1893.	87,600	27 11	52,800	28,800	—	—	6,000
1894.	90,100	30 0	58,900	25,300	—	—	5,900
1895.	103,600	30 0	70,000	28,600	—	—	5,000
1896.	105,600	31 2	74,300	28,700	—	—	2,600
1897.	120,300	28 6	81,400	35,000	—	—	3,900
1898.	128,500	30 0	91,600	34,800	—	—	2,100
1899.	129,300	31 6	93,000	34,000	—	—	2,300
1900.	148,600	37 1	105,300	40,500	—	—	2,800
1901.	148,600	35 4	114,800	31,200	—	—	2,600
1902.	142,100	29 3	110,400	30,100	—	—	1,600

* The principal source of supply is Germany, as shown in the foregoing Tables, and most of the coal from that country comes from the Prussian State mines in the Saar Valley district.

3. British coal is used principally in the southern and western parts of Switzerland.

4. and 5. Switzerland being an inland country, no information can be furnished in reply to these questions.

6. Although the quantity of British coal imported is only a small proportion of the total imports, the annual importation of British coal into Switzerland has been gradually increasing during the last ten years (the imports in 1900 show an exceptional increase). No returns of imports of different kinds of coal being given, it is not possible to state in which classes of coal an increase has taken place.

7. The greater portion of the imports of coal into Switzerland come from Germany (in 1902 it was 82½ per cent.), and are shipped by steamer to Mannheim, and thence by rail to Bâle.

The Swiss railway rates, chargeable on coal, are as follows (there are no differential rates on British coal) :— From Bâle to Zürich (for coals from Germany and Belgium) 4s. per ton ; from Mannheim to Zürich (for coals from the Saar and Ruhr mines), 9s. per ton ; from Geneva to Zürich (for coals from France), 10s. 3d. per ton ; from Romanshorn to Zürich (for coals from Germany and Austria) 3s. 8d. per ton.

8. It would perhaps be worth while to send British coal up to Mannheim, which is the nearest port to Switzerland, thus reducing the railway freight to almost a minimum. So far Germany has refused her support to the Swiss railway scheme to continue the Rhine Canal as far as Bâle, which would be a great facility for the importation of British coal.

Another favourable approach for British coal into Switzerland would perhaps be the port of Genoa, as there would then only be the short railway distance from Genoa to Arona, in order to reach Swiss territory.

9. There are no exports of coal from Switzerland. During the last ten years, 1893–1902, there has been a small exportation of coke, averaging 3,300 tons per annum. The increase in the exportation is only nominal.

10. According to the Swiss Customs Tariff now in force, the duty on the imports of coals and coke into Switzerland

is 2d. per ton, but in the new tariff, which will come into force next autumn, all imports of coal and coke will be free of duty.

There appears to me to be very little chance of the exports of British coal into Switzerland making any headway for two reasons, firstly, Germany, which is the largest supplier of coal to Switzerland, sells at a lower rate than any other country (except Austria, but only a nominal quantity is imported from that country).

In preparing the statistics for 1902, the Federal Customs estimated the values of the coals, imported from the various countries as follows :—

Germany.	France.	Belgium.	Great Britain.
per ton	per ton	per ton	per ton
23s. 2d.	25s. 3d.	32s. 7d.	33s. 4d.

Secondly, owing to the high railway freights, it would be difficult for British coal to compete with German coal from the Ruhr and Saar districts.

Of late years considerable pressure has been put upon the Swiss dealers by the German coal syndicates by means of an organised attempt to maintain the high prices for coal; and the opinion prevails, both in commercial and industrial circles, that Switzerland will, sooner or later, have to rely upon her immense water-power, and her facilities for working her railways and industries by electricity.

The Swiss Federal Council has nominated a full and representative Commission, in order to study the question of the electrification of the Swiss railways, both as regards the technical and commercial side. This Commission will be composed of technical and financial experts, selected from all parts of Switzerland.

TURKEY.

ADANA.

Extract from dispatch, dated Aleppo, 8th February, 1904, from Mr. H. D. Barnham, C.M.G., H.B.M.'s Consul at Aleppo.

Report of Captain A. F. Townshend, Vice-Consul at Adana.

1. (*a*) For domestic purposes—Nil.

(b) For steam and manufacturing purposes about 2,000 tons, of which about 1,800 tons are used by the Mersyna Adana Railway Company.

2. The sources of supply in each of the last ten years have been—(a) British; (b) Belgian; (c) Heraclia (Turkey) as supplied in briquettes by a French company.

3. To Hamidieh (Yarsonat) in small quantities, but generally not beyond Adana.

Transport is effected from the steamers by lighters; from Mersyna to Adana by rail; from the railway station at Adana to Hamidieh by ox-wagon.

4. Highest price paid for British coal (English Pacific) 30s. per ton. Lowest prices—British 25s., Belgian and Heraclia coal 20s. Prices reached their highest limit during the South African War.

5. No.

6. The supply has not fallen off.

7. All coals. Railway rates 38 piastres per ton from Mersyna to Adana (forty miles). Rate of Exchange, 110 piastres = £ Stg.

8. The preponderance of the coal supply is already British. It cannot be much increased until the country is more opened up, and more factories established. Briquettes are generally preferred to loose or lump coal.

9. None worth taking into consideration.

10. With reference to Question 9 there are some local coal mines from which small quantities of coal have from time to time been taken and even sent by sea to a few of the neighbouring coast towns, but the difficulties imposed by the Turkish Government have prevented any successful mining industry.

The import duty on coal is eight per cent.

British coal is generally recognised to be the best, and is exclusively used by the Adana Railway Company.

Practically no coal is used for domestic purposes, it being replaced by wood and charcoal.

ALEPPO.

Extract from dispatch, dated Aleppo, 8th February, 1904, from Mr. H. D. Barnham, C.M.G., H.B.M.'s Consul at Aleppo.

The questions propounded in the Memorandum . . . . . have no application to the City of Aleppo or to any town in the interior of this Vilayet.

ALEXANDRETTA.

Enclosure in dispatch, dated Aleppo, 8th February 1904, from Mr. H. D. Barnham, C.M.G., H.B.M.'s Consul at Aleppo.

Report of Mr. A. Catoni, Vice-Consul at Alexandretta.

1. About 350 tons, used only for steam purposes by four steam presses of liquorice root, and by two small locomotives employed for the drainage of the Alexandretta Marshes.

2. England.

3. No coal was imported for inland.

4. The highest price obtained for British coals during the last ten years was 40s. per ton delivered alongside steamers; the lowest being 18s. No other coals were sold here during the same periods.

5. None.

6. Nil.

7. No railway here.

8. There is nothing to be said under this heading, the small quantity of coal used here being exclusively imported from England.

9. No.

10. Nothing to report on the subject.

BAGHDAD.

Extract from a dispatch, dated Baghdad, 17th March, 1904, from Major L. S. Newmarch, Political Resident in Turkish Arabia, and H.B.M.'s Consul-General, Baghdad.

1. The present consumption of coal per annum in the Baghdad Vilayet is about 700 tons for manufacturing and steam purposes, and about 200 tons for domestic purposes.

Native blacksmiths have now begun to use coal instead of charcoal; they purchase the screenings.

2. The source of supply in each year during the last ten years up to the end of 1903 has been the United Kingdom, and I believe it has nearly all been Welsh coal.

I have been told that for the local factories of the Turkish Government a little coal has been obtained from Kifri, a place about five days' journey north-east of Baghdad, but I am unable to ascertain how much coal has been obtained thus locally. It must, however, be an inappreciable amount, and during the present year these factories have bought British instead of native coal, because the latter is of such bad quality.

3. No coal has penetrated into the interior beyond Baghdad, because there are no facilities for transportation.

4. Hardly applicable to Baghdad, where there are no railways or railway trucks. The average price of British coal delivered to the consumers at Baghdad during the last ten years has been £2 10s. per ton.

5. The amount of British coal imported and afterwards shipped for the bunkers of British vessels is about 80 tons yearly, *i.e.*, the proportion is about 10 per cent.

6. The quantity imported has increased, not fallen off.

7. There are no railways in or near this district.

8. The British coal trade here can best be maintained or increased by increasing the facilities of transport and communication. Railways are at present out of the question, but something might be done to increase the number of steamers plying between Basrah and Baghdad, and the competition between them. Coal can be brought to Basrah easily enough, but the price per ton for carrying it up the river 500 miles to Baghdad is nearly the same as the price from London to Basrah.

9. There are no exports of coal or coke from this district.

10. There is no competition with British coal. The import duty of 8 per cent. is levied in Basrah. The amount of native coal formerly used in the Government factory was probably not more than 60 or 70 tons per annum, and now its use has been discontinued.

The following is a return of coal landed in Baghdad during the last ten years:—

1894	654	tons
1895	1,436	,,
1896	1,070	,,
1897	791	,,
1898	931	,,
1899	655	,,
1900	956	,,
1901	577	,,
1902	1,175	,,
1903	633	,,
	8,878	,,

Average 887 tons per annum.

BASRAH.

Enclosure in dispatch, dated Basrah, 17th February, 1904, from Mr. F. E. Crow, H.B.M.'s Consul at Basrah.

1. About 13,000 tons per annum Welsh coal, United Kingdom; about 2,000 tons per annum Indian coal are used for bunker purposes. Quantity consumed for domestic and other purposes is insignificant.

2. United Kingdom and India, latter only imported for the British Indian Mail Service.

3. As far as Baghdad—500 miles up the Tigris. Steam river navigation:—Lynch, two vessels; Oman Ottoman Company, four vessels; Seniye Administration, two (in course of construction). Sailing craft.

4. No railways. Coal landed—Welsh, 25s. to 40s., and Indian, 29s. to 30s. during last ten years.

5. About 1,500 tons Indian coal consumed on board British India boats and 2,500 tons Welsh shipped for bunkers of ocean-going steamers. Three British lightering vessels at the bar use 700 to 800 tons annually. Lynch's river steamers consume about 3,000 tons and the Oman Ottoman some 6,000 tons per annum.

6. It increases in proportion to the number of steamers visiting the port.

7. No railways.

8. There is no local consumption to speak of except for bunker purposes. Importers are Bucknall Bros., British India, The Anglo-Arabian Company, and West Hartlepool Company.

9. None.

10. Import duty 8 per cent., and no rebate (at present) allowed on coal re-exported for bunker purposes.

BEIRUT.

Enclosure in dispatch, dated Beirut, 1st February, 1904, from Mr. R. Drummond Hay, C.M.G., H.B.M.'s Consul-General at Beirut.

1. The present consumption of coal per annum in this district is about 20,200 tons, distributed as follows:—

	Tons.
For manufacturing purposes	8,000
,, domestic purposes	200
,, railway ,,	10,000
,, steam ,,	2,000
Total	20,200

2. Sources of supply during the last ten years:—chiefly from the United Kingdom. Belgium has contributed an average of 10 per cent. during that period; and during the last four years an average of 12 per cent. has come from Heraclea.

3. British coal has penetrated about 220 kilometres inland from Beirut, *i.e.*, as far as Damascus and the Hauran.

4.

	1903.	1902.	1901.	1900.	1899.	1898.	1897.	1896.	1895.	1894.
Welsh Coal - -	28s.	27s.	37s.	40s.	36s.	28s.	28s.	27s.	27s.	26s.
Welsh Patent Fuel -	27s.	26s.	36s.	39s.	35s.	26s.	26s.	25s.	26s.	24s.
Belgian Patent Fuel -	25s.	24s.	34s.	37s.	34s.	25s.	25s.	24s.	25s.	23s.
Heraclea Coal - -	21s.	20s.	22s.	25s.	—	—	—	—	—	—

5. All coal shipped in the bunkers of British ships is British coal.

6. Generally speaking, there has been no fall in the imports of British coal during the last ten years, excepting in gas coal—which now comes chiefly from Heraclea on the Black Sea.

7. The railway rates chargeable on British coal are the same as for other coal—viz., 2d. per ton per kilometre.

8. No special suggestion can be made in this connexion—unless perhaps lower prices in order to meet foreign competition.

9. There is no export of coal or coke from the Beirut district.

10. None.

BENGHAZY.

Enclosure in dispatch, dated Benghazy, 8th February, 1904, *from Mr. Justin Alvarez (Tripoli), H.B.M.'s Consul at Benghazy.*

1. Coal is hardly ever used for domestic purposes, wood and charcoal being the combustible used as fuel in this province. There are no manufactories, and the railway formerly used for transporting blocks of stone from the quarries of Fwayhad to the shore to construct the breakwater is now disused.

2. Estimated quantities of coal imported in :—

1889 - - - -	575 tons.
1890 - - - -	750 ,,
1891 - - - -	No record.
1892 - - - -	,,
1893 - - - -	,,
1894 - - - -	,,
1895 - - - -	500 tons.
1896–1897 - - -	1,000 ,,
1898 - - - -	No record.
1899 - - - -	,,
1900 - - - -	200 tons.
1901 - - - -	300 ,,
1902 - - - -	No record
1903 - - - -	400 tons or more.

A certain quantity of coal dust is consumed here in the making of lime. In no year has this exceeded 600 tons. Highest price £1 per ton. Until last year it always came from Cardiff *vid* Malta, but up to the middle of November the local Government disposed of a large quantity of Heraclea coal of inferior quality at rates of from 6s. to 7s. 6d. per ton.

3. No coal is used in the interior, whether British or foreign.

4. The railway referred to in the answer to Question 1 was never used for the transport of coal.

5. During the last three years the former agent of the Anglo-Maltese steamers has ceased to maintain his coal depôt as he could not compete with the Italian Navigation Company, the steamers of which are subsidised.

He estimated the amount of coal consumed by these British steamers in the ten years between 1891 and 1900, both years inclusive, at 500 tons, or as far as can be ascertained five-seventeenths or less than a third of the total amount imported within that period.

6. The principal reason for the falling off of the quantity imported during the last twelve years has been the tendency of British steamers, which hitherto had plied regularly along the coast of the Regency, to abandon the ports of this province, viz., Benghazy and Derna. The was particularly remarkable in 1892, 1893, 1894, 1900, 1901, while last year was the worst.

7. Nil.

8. The best way by which the import of British coal may be increased is for a British line of steamers, *e.g.*, the Khedivial Company, which is now British, or any other such as Bell's Asia Minor or the Moss Lines, to run between Port Said or Alexandria at one end, and Malta at the other, calling at Benghazy and Derna on the way. Should it be necessary, Candia and other Cretan ports might be called at, and the line might be prolonged to Mesurata and Tripoli. Such a line would greatly facilitate and probably develop the cattle trade, which hitherto has been mainly overland, as well as that in agricultural and pastoral produce. If properly worked, it should be remunerative and would perhaps necessitate or in any case be facilitated by the establishment of a coal depôt for the use of the company's steamers.

9. None.

10. No coal other than British being imported into this town, no question of import duties affecting its competitive power arises.

CONSTANTINOPLE.

Enclosure in dispatch, dated Constantinople, 22nd February, 1904, from Mr. H. C. A. Eyres, H.B.M.'s Consul at Constantinople.

1. The consumption of coal in this district during the year 1903 has been as follows:—

	Tons.
(*a*) Quantity used for domestic purposes, manufacturing, gas, or steam purposes	206,000
(*b*) Quantity used for bunkering steamers	250,980
	456,980

2. The sources of supply during the last ten years have been as follows:—South Wales, Yorkshire, Newcastle, Lancashire, Heraclea (Turkey), Russia.

Details of supply for the last three years:—

	1901. Tons.	1902. Tons.	1903. Tons.
Cardiff	161,302	168,816	187,060
Newcastle	34,600	31,639	50,640
Liverpool	4,450	2,021	3,282
Yorkshire (Gas Coal)	40,000	34,000	40,000
Turkish	86,635	126,000	169,854
Russian (Anthracite)	—	—	5,590
American	—	—	554
Total	326,987	362,476	456,980

3. A small quantity of Cardiff (about 4,000 tons) per annum has been sold to Adrianople, and transported by the Oriental Railway. A smaller quantity has been sold to Angora, and transported by the Anatolian Railway.

4. The highest and lowest prices obtained here for British coal delivered ex-ship, free of duty, during the past ten years, and the price of Turkish coal sold under similar circumstances during the same period, were as follows:—

	s.	d.
Cardiff—		
Highest price	34	6
Lowest price	15	0
Newcastle—		
Highest price	32	6
Lowest price	14	3
Turkish—		
Highest price	28	0
Lowest price	11	0

5. The quantity of British coal shipped for the bunkering of British steamers during the year 1903 was about 30,000 tons.

6. The quantity of Cardiff coal imported during the past ten years has increased. The quantity of Newcastle coal imported has decreased owing to the competition of the Turkish coal.

7. Rate of transport upon the Oriental Railway about 10s. per ton to Adrianople; a distance from Constantinople of about 150 miles.

There are no differential rates for British coal as compared with other coal.

8. No; unless it be to remove the export tax from Newcastle coal. The export tax, even if considerably increased, could not affect the sale of best Welsh, but lower qualities may be affected by it.

9. The only coal exported from this district is the Turkish coal from Zoungouldak. The quantity exported is on the increase. The total output from the Turkish mines at Heraclea was about 300,000 tons during 1903. Of this, some 60,000 tons were used for bunkering Turkish and other steamers trading along the Black Sea coast, at the coal company's own port at Zoungouldak. About 70,000 tons were shipped to Smyrna, Salonica, Beyrut, Piræus, and Trieste; the balance came to Constantinople. Present prices of Turkish coal:—

Screened and washed	20s.
Screened	17s.
As taken from mine	14s.

10. The import duty upon foreign coal consumed by local steamers, or on shore, is 8 per cent. ad valorem, or about 2s. per ton on Cardiff coal. Coal shipped for bunkering purposes upon foreign steamers bound to non-Turkish ports is free of duty. Turkish coal pays a royalty of about 10d. per ton at the mines and is free of duty here.

CANDIA (CRETE.)

Enclosure in dispatch, dated Canea, 27th February, 1904, from Mr. E. W. Howard, H.B.M.'s Consul-General at Canea.

Report of Mr. L. E. Lawson, Vice-Consul at Canea.

1. About 200 tons per annum; 115 tons for domestic purposes, and eighty-five for manufacturing purposes.

2. From Syra and the Piræus by sailing vessels. One hundred tons used by the British troops is imported from Malta.

3. Not used in the interior.

4. No coal delivered to vessels.

5. Nil.

6. Stationary.

7. No railways exist.

8. No.

9. No.

10. Import duties at present 11 per cent. ad valorem.

CANEA (CRETE).

Enclosure in dispatch, dated Canea, 27th February, 1904, from Mr. E. W. Howard, H.B.M.'s Consul-General at Canea.

1. About 1,000 tons per annum. Eighty tons for domestic purposes, 180 tons for manufacturing purposes, and the rest for steamers.

Canea and Candia are the only places in the Island where coal is imported and used.

2. Always Cardiff coal. Shipped direct to Suda Bay up to 1899 and since then transhipped at Malta or Syra for Suda.

3. Not used in the interior.

4. No railways in Crete. Coal for Suda is purchased at Malta and Syra.

5. None.

6. Fewer warships have visited Suda Bay since 1899.

7. No railways.

8. No.

9. No.

10. Import duties 11 per cent. ad valorem.

DAMASCUS.

Enclosure in dispatch, dated Damascus, 4th February, 1904, from Mr. W. S. Richards, H.B.M.'s Consul at Damascus.

1. Four hundred tons of coal are consumed annually in this district by the blacksmiths in their forges, and by no others. Coal is not used for domestic purposes either here or in the outlying districts. A small amount of coke—some fifty tons—is consumed annually in this city, partly for domestic purposes and partly in the manufacture of sweetmeats. In the above calculation the amount of coal consumed on the Beirût-Damascus-Hauran Railway, the Ryak-Hamah branch of the same system, and that part of the Hejaz Railway which has been thrown open for traffic is not included.

2. During the five years from 1894 to 1898 (both inclusive) there was an average importation of 100 tons of British coal (Cardiff) through Beirût, twenty-five tons of Belgian, and another twenty-five tons of French coal. During the years 1899, 1900 and 1901 there was an average annual importation of 200 tons of coal, *i.e.*, 150 tons from the United Kingdom and 50 from Belgium. During the last two years, viz., 1902 and 1903, there has been an average annual importation of 400 tons of coal distributed as follows:—From the United Kingdom (Cardiff), 100 tons; from the United Kingdom (Pacific), 150 tons, briquettes; from the United Kingdom (Cardiff), 100 tons, briquettes; from Belgium ('Ancre'), 50 tons, coal.

3. The neighbouring towns and villages are supplied from Damascus and a certain amount of coal is sent down into the Hauran district of this province. In all cases it is used by blacksmiths. During the last nine years coal has been brought to Damascus by the Beirût-Damascus-Hauran Railway, now known as the "Chemin de fer Damas-Hama et Prolongements" which was opened for traffic in 1895. In the summer of 1902 the Ryak-Hamah branch of this railway, which will ultimately be carried to Aleppo, and in the course of time be joined to the projected Baghdad Railway, was thrown open for traffic. The Hejaz Railway is now in course of construction, some 148 miles being already open for traffic. From this railway a branch line is now being made from Deran to Haifa. It is stated that this line will be finished in eighteen months time. From the above it will be seen that the facilities for transportation, which in the past have been somewhat meagre, will in the future be considerable.

4. This question can only be answered at Beirût.

5. To this query, too, no answer can be supplied here.

6. As shown above, the quantity of British coal and coke imported into this district has increased during the last ten years.

7. The freight of a ton of coal from Beirût to Damascus, whatever be the country of origin, is, including carriage and porterage at both places, 100 piastres = 18s. 2d., *i.e.*, twenty-five paras per ton kilometre = twopence per ton per mile, the distance being 144 kilometres = ninety miles.

8. The British coal import trade is increasing, owing to the rise (likely to be maintained) in the price of charcoal which formerly was used exclusively by blacksmiths, who, however, of recent years have entirely abandoned its use. In any case, however, as the numbers of persons plying this trade is limited, the rate of increase is not likely to continue for an indefinite period; indeed it has probably nearly reached its extreme limit already. The dearness of coal here—sixty francs (£2 8s.) per ton of Cardiff coal; 59 francs (£2 7s. 2d.) per ton of "Pacific" (briquettes of better quality), 58 francs (£2 6s. 4d.) per ton of the inferior kind of briquettes, and 57 francs (£2 5s. 6d.) for the Belgian article, renders its general use for domestic purposes impossible, even by the well-to-do. Moreover no stoves are procurable in this country in which coal can be burnt.

It is on the different railways mentioned above that the demand for and consumption of British coal admits of a very considerable increase in the future. I am informed that on the Mecca Railway, British (Cardiff) coal has been consumed up to the present at the rate of some 9,000 tons per annum. The consumption in the future will be very much greater, it being calculated that 20,000 tons will be required annually. It is to be hoped that British coal will be used in the future as in the past. I hear that a temporary arrangement has been made in accordance with which coal known as "Yaba" (sic) is to be used on this line for the next two months, costing only 30 francs (24s.) per ton at Beirût, which is at least four francs less than the lowest price quoted hitherto. I cannot learn, even from the Traffic Manager of the Railway, what the country of origin of this coal is. On the French line—"Damas-Hama et Prolongements"—I hear that about 9,000 tons of coal are consumed annually, most of which is Cardiff coal made up in the form of briquettes, but I cannot guarantee the accuracy of this information as regards the volume of consumption, which should be obtained from the head offices of the Company at Beirût.

9. No.

10. This question can best be answered at Beirût.

ERZEROUM.

Extract from dispatch, dated Erzeroum, 8th March, 1904, from Mr. A. Shipley, H.B.M.'s Acting Consul at Erzeroum.

There is no importation or exportation of any kind of coal into Erzeroum, or any part of this Consular district.

HODEIDAH AND CAMARAN.

Enclosure in dispatch, dated Jeddah, 26th March, 1904, from Mr. G. P. Devey, H.B.M.'s Consul at Jeddah.

Report of Mr. C. A. Richardson, Vice Consul at Hodeidah.

1. Coal is used at Hodeidah and Camaran for steam purposes for the Turkish warships and transports in Yemen waters, by the Lazaret at Camaran for the distillation of water and for the manufacture of ice; also at the Ottoman Public Debt's salt works at Salif for mechanical purposes.

The annual consumption by the Turkish fleet is variable, ranging between 1,500 and 2,000 tons, according to the call for local transport and the number of ships stationed at Camaran.

The Camaran Lazaret consumes about 200 tons every year and the Salif salt works about the same quantity.

No coal is used for domestic purposes.

2. The Turkish ships are invariably supplied with coals from Constantinople, chiefly of Cardiff or Newcastle produce, no direct shipments arriving here.

It is sometimes found necessary to apply to Perim or Aden for emergency requirements.

The Ottoman Sanitary Administration purchases its supply for Camaran at Suez, as a rule, from which source the administration of the Ottoman Public Debt supplies Salif also.

3. No coal is sent to the interior of the Yemen, there being no railways or manufacturing establishments in this vilayet.

4. This question is not applicable to my Consular district for obvious reasons.

5. There are no stocks of coal in the hands of private individuals or companies.

6. Such coal as is used here by the Turkish Navy and the Camaran and Salif establishments is, as already stated, generally of British origin.

7. No railways in the Yemen.

8. There being no coal trade in this district, I have no suggestions to offer.

9. No.

10. Camaran, and one or two harbours in the Farsan group are the only ports where coal can conveniently be stored for supplying ships, but such places would not be made use of, owing to the proximity of Perim and Aden.

It is doubtful whether the Ottoman Government would permit the establishment of a private coal depôt in any place along the Yemen littoral.

The introduction of locomotives, dynamos, and machinery worked by steam, is prohibited and requires special permission in the shape of an Imperial Iradi—hence I may state that there is no opening for the British coal trade in this vilayet.

JEDDAH.

Enclosure in dispatch, dated Jeddah, 27th January, 1904, from Mr. G. P. Devey, H.B.M.'s Consul at Jeddah.

1. No coal or coke—only charcoal—is used for domestic purposes; there is no manufacturing or steam use of coal.

2. Consignments from home and Aden to Messrs. Gellatly Hankey & Co. in the past ten years amounting to about 700 tons.

3. Coal carried to Mecca by camel (only five or six tons per annum) has been used for water raising at Muna, but is not at present.

4. No answer.

5. Coal is only imported for bunker purposes; about ten years ago the average price was 40s., and in the last seven years has risen to 50s. and 60s., or more, according to stock in hand. It is usual for navigation companies' ships that frequent this port to carry some extra coal to feed sister ships in case of need, thereby avoiding purchase. Only a very simple "outsider" (or a ship in most exceptional cases) would think of coaling at Jeddah, and in such cases would probably have to pay £5 per ton to reach Suez or Aden. The Turkish transport (Makhsousse) Company ships often bring extra coal (Heraclea, densely-smoking) from Constantinople, but keep no regular store.*

6. In my opinion the import of British coal has been decreasing during the last ten years, for reasons shown in the last answer.

7. No railway.

8. Trade in British coal is not, under present conditions, needed.

9. No.

10. Import duty 8 per cent., present stock, 140 tons; sales uncertain; deterioration rapid; a few hundred tons British Indian coal might some day be stocked annually, there would be a demand on completion of the Damascus-Medina-Mecca Railway perhaps. But with the natural obstacles of location, Perim and Port Said to left and right, and Suez Canal dues, British coal will probably never be an article of import.

* This company have a shed in which there are always a few tons for the needs of their own ships, but the amount has never exceeded 250 tons at one time.

JERUSALEM.

Enclosure in dispatch, dated Jerusalem, 19th *February,* 1904, *from Mr. John Dickson, H.B.M.'s Consul at Jerusalem.*

1. The present consumption of coal in this Consular district is about 3,000 tons per annum, and may be classified under the following heads, namely :—

	Tons.
In Jerusalem, by flour mills and blacksmiths	400
By the Jaffa-Jerusalem Railway Company	1,100
By the Jewish Colony, "Richon," for their engines employed in the wine manufactory	1,000
By flour mills in Jaffa	400
By blacksmiths in Jaffa	100
Total	3,000

Hardly any is used for domestic purposes.

2. The amount of coal imported at Jaffa during the last ten years has been 35,000 tons, or an average of 3,500 tons per year.

The sources of supply have been as follows :—

	Tons.
From Belgium (Patent briquettes) annually	1,500
From England—Cardiff coal, annually	500
From England—Cardiff "Patent fuel," annually	900
From Turkey—Heraclea Coal, annually	250
From Turkey—Heraclea (briquettes)	350
Yearly importation	3,500

Turkish coal was first introduced into the country about three years ago, and Belgian coal has ceased to come into the country during the last two years.

3. British coal has, during the last two years, penetrated into the country as far as Jerusalem, by railway, and into parts of the country in the neighbourhood of Jaffa distant from the railway line, by camels.

4. As vessels anchor in the roadstead of Jaffa, no railway trucks can go alongside the shipping, but British, Belgian and Turkish coal, patent fuel, and briquettes all sold at that port during the last ten years at pretty nearly the same price, which varied from 28s. to 30s. per ton, except during the war with the Transvaal when they fetched 43s. per ton.

5. During the last ten years only thirty tons of coal were sold to a British steamer of "Bell's Asia Minor SS. Company," and also thirty tons to an Italian steamer for their bunkers.

6. The quantity of British coals imported cannot be stated to have fallen off during the last ten years, nor has the price diminished. It varied in price from 28s. to 30s. per ton according to the quantity in stock on shore. The importation, however, of Turkish coal free of custom duty tends to diminish the quantity of other coal brought into the country.

7. The railway rates chargeable for British, Belgian and Turkish coal, and the price of transport by other means are the same. It is brought by rail to Jerusalem at 14s. 6d. per ton, or by camels at the same rate.

8. The Turkish coal from Heraclea being, as stated above, exempt from custom duty, and paying about 10 per cent. less for freight, finds a preference among speculators at Jaffa who manage to sell it at very nearly the same price as British and Belgian coal.

No suggestion can be made for increasing the consumption of British coal in this district. It might be developed by the future introduction of industrial and agricultural machinery into the country, and also by the construction of roads, which would facilitate its transportation, and curtail the demand for wood, which is now much used as fuel. The denudation of the country of trees, which has been going on for some years, gives some hope of an increased demand for coal in the future.

9. There are no exports of coal or coke from this Consular district.

10. The import duty on coal at the port of Jaffa is 8 per cent., on the value, and the expense of landing it is about 1s. 6d. per ton. A shed capable of holding about 2,000 tons can be rented for about £40 per annum. At present about 2,500 tons are stored on shore at Jaffa for sale. Insurance is at the rate of ½ per cent. per annum, and there are two native merchants at Jaffa who, for many years past, have been engaged in the trade.

KONIA.

Enclosure in dispatch, dated Konia, 26*th January,* 1904, *from Mr. Charles S. Hampson, H.B.M.'s Vice-Consul at Konia.*

1. The railway company is the only consumer of coal in Konia ; Vice Consul at Adalia could given information as to quantity consumed at Adalia or other ports.

2. All coal used by railway comes from Constantinople, and is, I understand, Cardiff coal. Some years ago, the railway tried using coal from a mine at Chaï, near Kara Hissar ; but it was found useless.

3. Coal came to Konia with railway eight years ago.

4. Price paid by railway can only be learnt at Constantinople.

5.

6. Use of coal by railway is increasing, and will increase as railway is prolonged.

7. Railway rate for coal is £3 16s. 6d. per ton—no doubt would be reduced if there were any import ; coke (for one wagon—15 tons—once brought) £10 18s. ; no differential rates.

8. There is no industry here : consequently no demand for coal. Wood is used for domestic purposes. A few wagon-loads of coal and coke are used by officials of railway.

9. Mines exist, but are unworked. One is at Chaï (near Kara Hissar), another near Karaman.

10. Until industries are developed, any demand for coal is improbable.

SALONICA.

Enclosure in dispatch, dated Salonica, 1st March, 1904, from Mr. R. W. Graves, C.M.G., H.B.M.'s Consul-General at Salonica.

1. The present consumption of coal per annum in this district is as follows:—

Cardiff coal, tons	24,200	13,200 for railway purposes. 11,000 for manufacturing purposes.
Newcastle coal, tons	2,500	for gas works.
Total	26,700	

Practically no coal is used for domestic purposes. The coal used for railway purposes is distributed as follows:—

	Tons.
Oriental Railway Line - - - - - -	8,000
Salonica Monastir Line - - - - - -	3,500
Junction Line (Constantinople—Salonica) - -	1,700
	13,200

The Junction Line imports about 5,000 tons annually, of which one-third is British coal (tons 1,700), and two-thirds Turkish coal from Heraclea.

2. Figures are not procurable for the ten years up to the end of 1903, but the supply has varied very little during that period, and the sources have been Cardiff and Newport for manufacturing and steam purposes, and Newcastle for gas purposes, in the proportions given above, *i.e.*, about 90 per cent. Cardiff to 10 per cent. Newcastle.

3. The only British coal which penetrates into the interior is that carried by the railways for their own consumption to their stations of Uscub, Monastir, Serres and Drama.

4. The information available under this head is very scanty. The only British coal delivered into railway trucks alongside vessels has been Cardiff coal for railway use, at prices varying from 22s. to 33s. 6d. per ton, which is the present price.

5. The only coals shipped for bunkers of British vessels are coals supplied occasionally to His Majesty's ships of war. None have been shipped here for three years, and the quantity never exceeds a few hundred tons in the year.

6. There is practically no change in the quantity imported.

7. There being no use for coal in the interior, except for railway purposes, there are no special railway rates for coals.

8. A reformed Administration would, no doubt, encourage and develop manufacturing industries and railway enterprise to the benefit of our coal trade. More frequent visits of British and foreign naval squadrons would also have a beneficial effect.

9. There are no exports of coal or coke from this district.

10. As British coal encounters no competition, there is no room for suggestions under this head.

SAMOS.

Extract from Mr. Gregory R. Marc's dispatch, dated Samos, 24th February, 1904.

The only coal brought into this island is a small quantity usually from Syra, Greece, required for two or three steam flour mills, and also a small quantity required for the Turkish guardship of this island.

SMYRNA.

Enclosure in dispatch, dated Smyrna, 11th March, 1904, from Mr. H. A. Cumberbatch, C.M.G., H.B.M.'s Consul-General at Smyrna.

1. The annual average importation of coal to Smyrna is estimated at 125,000 tons. Practically the whole is used for steam and manufacturing purposes, only about 1,000 tons being consumed for domestic purposes.

2. Up to about ten years ago the imported supply was exclusively from the United Kingdom. Since then the coal of the Heraclea (Black Sea) mine has made its appearance, increasing every year until it has reached 35,000 to 40,000 tons per annum.

3. As far as Aidin and Cassata, the chief stations of the two railways serving Smyrna, but in insignificant quantities, say, 500 tons per annum.

4. The annexed Table shows the highest and lowest prices obtained for British and other coals delivered alongside coaling stores in each of the last ten years. There is no delivery into railway trucks alongside vessels at Smyrna.

5. About 5 per cent. of the British coal annually imported into Smyrna is afterwards shipped for the bunkers of British vessels; 50 per cent. going for bunkers of foreign vessels; 30 per cent. for railways and gasworks; 15 per cent. for local factories and local consumption.

6. There has been no falling off of British coals imported into Smyrna, but, were it not for the importation of the Turkish (Heraclea) coal, the imports of British coal would have been greater as the demand has been steadily increasing.

7. The railway rates chargeable on British coal are from 4d. to 10d. per cwt. according to the distance conveyed. There are no differential rates.

8. The British coal trade can be maintained and perhaps increased by the removal of certain vexatious Custom House regulations connected with the system of valuation for taxing purposes, and by the introduction of greater unloading facilities (*e.g.*, use of coal hulks). The delivery in railway trucks alongside vessels will be feasible on completion of the projected prolongation of the railway pier and should reduce expenses.

9. There are practically no exports of coal from this district. The Mediterranean Steam Coal and Iron Company of London possess a concession for the working of a coal (lignite) mine at Keramos in this district, but up to the present have only shipped about 400 tons to Piræus and the same quantity to Smyrna. The works are temporarily suspended for want of funds. There are five other coal (lignite) mines in the Smyrna district (1) at Sokia, belonging to a large liquorice root firm, the annual output (500 tons) being regulated according to the requirements of their factories; (2) at Nazli, belonging to the same firm, but not worked at present; (3) at Nazli, belonging to a Greek and worked with a view to exportation, but, like the Keramos mine, the working has ceased for want of funds; (4) at Nazli, and (5) at Soma, belonging respectively to a Frenchman and an Ottoman, but never properly worked. The quality of the lignite extracted from all these local mines is said to be even inferior to that of the Heraclea mines, and there appears to be no fear of its competing with British coal, unless future workings bring to light a better quality of coal, which appears doubtful.

10. The Customs duty on British coal is 8 per cent. ad valorem on importation, while Turkish coal is admitted free of duty.

PRICES OF COAL AT THE PORT OF SMYRNA FROM 1894 TO 1903.

Quality of Coal.	1894.		1895.		1896.		1897.		1898.	
	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
Welsh	20 0	19 0	19 6	18 0	20 6	19 3	23 0	20 6	32 3	22 0
North Country	17 6	16 0	17 6	15 0	17 6	15 6	19 0	17 6	27 0	19 0
Turkish	16 3	15 0	15 6	14 9	16 6	16 0	18 0	16 6	25 6	17 6

	1899.		1900.		1901.		1902.		1903.	
Welsh	37 0	22 6	44 0	33 0	37 6	26 6	25 0	22 0	24 6	23 0
North Country	32 0	20 0	38 0	27 6	32 0	22 6	21 6	19 6	21 6	19 0
Turkish	27 0	17 0	32 0	25 6	26 6	20 0	19 6	17 6	19 0	18 0

TREBIZOND.

Extract from dispatch, dated Trebizond, 19th January, 1904, from Mr. H. Z. Longworth, H.B.M.'s Consul at Trebizond.

The consumption of coal in this Consular district is extremely limited, and there is at present no prospect of the demand for such fuel becoming less insignificant.

TRIPOLI.

Extract from dispatch, dated Tripoli, 22nd January, 1904, from Mr. Thomas S. Jago, I.S.O., H.B.M.'s Consul-General at Tripoli.

No coal is imported into this country either for domestic or manufacturing purposes, and none for sale, there being no demand.

About 1,000 tons annually of Welsh coal are brought, however, from Malta, in small quantities at a time, for the use of the four Esparto Grass Hydraulic Steam Presses.

ASIA:

ARABIA, *see* TURKEY (HODEIDAH AND CAMARAN.)

BATAVIA (JAVA), *see* NETHERLANDS.

BORNEO.

BRUNEI AND SARAWAK.

Extract from dispatch, dated Brunei, 13th February, 1904, from Mr. G. Hewett, H.B.M.'s Consul at Brunei.

No coal from the United Kingdom is imported into the district.

Sarawak consumes coal from her own coal mines at Brooketon and Sadong.

British North Borneo relies for the small quantity required upon the coal mines of Labuan.

Brunei Cutch factory consumes a small quantity of screenings from the Brooketon mine.

Export.—In 1901 Sarawak exported 5,651¼ tons, and in 1902 this was reduced to 2,216. The Sadong mine has at present no output, and the export has ceased, but this will only be temporary. Brooketon Colliery is in good order, but at present the only market is in Labuan.

CHINA.

AMOY.

Enclosure in dispatch, dated Amoy, 21st September, 1904, from Mr. P. F. Hausser, H.B.M.'s Consul at Swatow.

1. The consumption of coal in this Consular district during the year 1903 was 16,150 tons, the average consumption for the ten years 1894–1903 having been 10,079 tons. The quantity used for domestic purposes may be roughly estimated at 1,000 to 1,500 tons per annum, the remainder being imported for the use of local shipping.

2. The sources of supply during the last ten years, up to the end of 1903, were :—

	Tons.
Japan, gross import - - - -	103,889
Annam, ,, ,, - - - -	27,005
Hong Kong ,, - - - - (mostly Cardiff coal).	22,728
Formosa ,, ,, - - -	9,919
A total of	163,541

of which 62,747 tons were re-exported to Foreign Countries, Hong Kong and Chinese Ports, leaving a net import for the ten years of 100,794 tons.

3. There is no demand inland for British coal, and facilities for its transportation, except for short distances by water, are practically nil.

4. The highest and lowest prices obtained for British and other kinds of coal per ton delivered into lighters alongside vessels in each of the last ten years were as follows:—

	Highest Price.		Lowest Price.	
	British.	Other kinds.	British.	Other kinds.
		$		$
1894	No regular stock kept here till 1898.	12	No regular stock kept here till 1898.	10
1895		12		10
1896		12		10
1897	$	13	$	11
1898	40	14	30	12
1899	35	13	25	11
1900	40	12.50	30	10.50
1901	40	13	30	11
1902	35	13	25	11
1903	35	12	25	10

5. There is hardly any demand for British coal at this port except for an occasional man-of-war, and the average annual import during the last ten years—2,273 tons—was probably all disposed of in this way.

6. The import of British coal shows rather a tendency to increase, owing to the greater number of men-of-war of all nationalities now frequenting the port.

7. There are no railways in this Consular district.

8. Arrangements might be made by British merchants with the Naval authorities to keep stocks of British coal for the supply of His Majesty's vessels of war visiting the Port—but this would diminish the supplies required at Hong Kong.

9. There is at present no export of coal or coke from this district.

10. The high price of British coal necessarily interferes with its consumption by local steamers, which all burn Japanese coal, costing less than a third of the price of British. On Asiatic coal the import duty is 2 mace, 5 candareens, equal to 8d. per ton, whilst on other kinds the duty is 6 mace, equal to 1s. $7\frac{1}{5}$d. per ton.

CANTON.

Enclosure in dispatch, dated Canton, 7th September, 1904, from Mr. C. W. Campbell, C.M.G., H.B.M.'s Acting Consul-General, at Canton.

1. The total amount of coal imported into Canton in 1903 was 195,600 tons. The import, which represents fairly accurately the present local consumption, is increasing rapidly. The coal is almost all used for manufacturing and steam purposes.

2. Until 1901 70 per cent. of the coal used in Canton came from Tonkin; the remainder came from K'ai-ping (North China) and Japan.

In 1902 40 per cent. came from Tonkin, and the remainder almost wholly from Japan.

In 1903 rather less than half came from Tonkin and the remainder nearly all from Japan.

3. No British coal has penetrated to Canton.

4. See answer to Question 3.

5. Do do

6. Do do

7. Do do

8. Do do

9. There is no export of native coal.

10. The following are the import duties levied on coal at this port:

	Tael	s.	d.	per ton
Coal, Asiatic	·25	8		,,
,, other kinds	·6	1	7	,,
,, Asiatic briquettes	·5	1	4	,,
Coke, Asiatic	·5	1	4	,,
,, other kinds	·9	2	$4\frac{1}{2}$	,,

CHINKIANG.

Enclosure in dispatch, dated Chinkiang, 12th September, 1904, from Mr. J. N. Tratman, H.B.M.'s Consul at Chinkiang.

1. The present annual consumption of coal in the Chinkiang district is about 60,000 tons. Of this not more than one-tenth is for domestic purposes, the fuel of the people being chiefly reeds and charcoal. The rest is used for steam launches, passing steamers, silk filatures, and by blacksmiths and iron workers generally.

2. The sources of supply have been and are Japan and the province of Hunan (Hankow), in the proportion of about two-thirds from the former country to one-third from Hankow.

3. Practically no British coal is consumed here. Once in a way 100 tons or so may be brought up from Shanghai for the convenience of passing men-of-war, but no appreciable stock is kept. The facilities for transportation within this district are waterways and none other.

4. The best Welsh coal would be quoted at about 61s. a ton. Japanese coal stands at 12s. 10d., 15s. 4d. and 18s. a ton, for three grades. Hankow coal is quoted at 25s. 8d. a ton. The trade is all in Chinese hands and statistics for ten years past are not obtainable.

5, 6, 7, 8. See No. 3.

9. There are no exports of coal or coke from this district. There are coal deposits within the district, but no mines have so far been opened.

10. Under the conditions existing, and likely to continue, within the district of Chinkiang, it is difficult to see how there can be any opening for British coal. The import duty on Asiatic coal is 2 mace 5 candareens a ton, on other kinds 6 mace.

CHUNGKING.

Enclosure in dispatch, dated Chungking, 28th October, 1904, from Mr. H. Sly, H.B.M.'s Acting Consul at Chungking.

1. As far as can be estimated, the annual consumption of coal in Chungking may be roughly taken at 240,000 tons, and its only use—excluding the amount consumed by the British and French gunboats—is domestic.

2. Local: according to travellers, coal of good quality abounds all over the Province of Ssuchu'an.

3. British coal does not penetrate to Chungking; the one means of transportation from Ichang is by junk, a distance of 400 miles occupying from thirty to ninety days. The journey is dangerous, the river being beset with bad rapids and adverse currents which at high water are of great strength.

4, 5, 6, and **7.** There being neither railways, nor merchant steamers nor British coal in Chungking, these questions call for no reply.

8. No. There is, as stated above, local coal in plenty, and the freight on British coal for a distance of 1,400 miles from Shanghai (the first 1,000 miles by steamer) would render it impossible for it to compete with the native article at Chungking—even if a railway should at some future time be built.

9. Coal—at the most 2,000 tons a month—procured from the Lungwangtung mines about thirty miles from Chungking, is exported to Ichang and Hankow, where it can be sold sufficiently cheap to compete with the Japanese commodity. The price per ton at Ichang is Taels 9·50: at Hankow Taels 11·50.

FOOCHOW.

Enclosure in dispatch dated Foochow, 20th September, 1904, from Mr. H. F. Brady, H.B.M.'s Consul at Chefoo.

1. Practically the only coal used in this district is what is consumed by shipping, and by two Russian Brick Tea factories, the Arsenal at Pagoda Anchorage, and the Mint, the supply of which is procured from Japan.

Local native industries use but little, and this is of an inferior quality, obtained from native hill-side borings.

British coal is unknown on the market, the only import of coal being from Japan and Formosa.

No statistics are available except what are shown in the Customs Returns, the total import during 1903 amounting to 10,490 tons, of a value of Hk. Taels 75,737 = £9,980, @ 2s. 7⅝d.

2. Japan and Formosa.

3. The only means of transportation is by junk or carrying coolies. No British coal is imported.

4. There are no railways, and no quotations for British coal, though it would probably cost $50–$60 per ton. The prices of other coal are as follows:—

Japanese	$10·50–$12 per ton.
Formosan	$7·50–$8·50 per ton.

Native: during 1903 about 300 tons were sold at about $14 per ton, and during the present year about half as much at $16·50.

5. None.

6. No remarks.

7. No railways exist in the district.

8. There is little likelihood of any demand for British coal springing up in this district, owing to the high price, and to the absence of industries requiring a superior coal.

9. No export.

10. The import duties on coal are as follows:—

Asiatic, per ton	Hk. Taels 0·250
Other kinds, per ton	,, 0·600
Asiatic, briquettes	,, 0·500

which are approximately equivalent to 8d., 1s. 7d., and 1s. 4d., respectively.

HANGCHOW.

Enclosure in dispatch, dated Hangchow, 12th October, 1904, from Mr. R. H. Mortimore, H.B.M.'s Consul at Hangchow. Ningpo.

1. The import of coal into Hangchow in 1903 was 21,983 tons of Japanese and 31 tons of Chinese coal: total, 22,014 tons. It is almost entirely used for manufacturing and steam purposes.

2. The supply of coal each year since the opening of the port to foreign trade is as follows:—

Year.	Japanese Coal.	Average value at 1s. 10d. per $.	Chinese Coal.	Average value at 1s. 10d. per $.
	Tons.	£ s. d.	Tons.	£ s. d.
1903 - - - -	21,983	1 3 2	31	1 0 9
1902 - - - -	16,626	1 10 2	225	19 3
1901 - - - -	11,489	1 7 6	83	18 0
1900 - - - -	7,941	1 7 6	91	19 3
1899 - - - -	17,694	1 5 11	75	15 6
1898 - - - -	9,191	1 5 11	—	—
1887 - - - -	1,664	1 0 6	—	—
	86,588	1 5 9	505	18 7

3. No British Coal is imported.

4. The average value of coal was:—
Japanese, £1 5s. 9d., and Chinese 18s. 7d. per ton.

5.
6.
7.
8. } None.

9. No coal or coke is exported.

10. The duties on imported coal are as follows:—Asiatic and Japanese Coal, Haikuan Taels 0·250 per ton = 8½d.: other kinds of coal—Foreign Haikuan Taels 0·600 per ton = 1s. 7¾d.: Asiatic Briquettes, Haikuan Taels 0·500 per ton = 1s. 4½d.

HANKOW.

Enclosure in dispatch, dated Hankow, 19th September, 1904, from Mr. G. M. H. Playfair, H.B.M.'s Consul-General at Hankow.

1. Consumption of coal per annum: 83,487 tons, foreign coal; 527 tons, native coal.
No statistics to show whether used for domestic or other purposes.

2. Sources of supply are Japan, Ch'ungking and P'ing-hsiang.

3. British coal has not penetrated as far as Hankow for general purposes, except in small quantities for the use of the British Navy.

4. No statistics available.

5. See answer to question 3.

6. See answer to question 3.

7. See answer to question 3.

8. British coal will not find it possible to compete with the cheaper native and Japanese coal, as these satisfy all purposes for which they are used.

9. Export of coal 80,219 tons; export of coke, 2.080 tons; both these are increasing slowly.

10. No statistics available.

ICHANG.

Enclosure in dispatch, dated Ichang, 28th September, 1904, from Mr. H. Goffe, H.B.M.'s Consul at Têngyüeh.

1. There are no returns available showing the annual consumption of coal in this district, but the amount of coal imported into Ichang averages roughly one thousand tons per mensem. Almost the whole of this is for the use of steamers, only a very small proportion being employed for domestic purposes. There are no manufactures in which coal is used in this district.

2. Up to within the last three years Japanese coal was almost exclusively used by steamers; but since that time Chinese coal from Ch'unking has largely taken its place with vessels other than Japanese. This Ch'ungking coal is excellent steaming coal, and has now been adopted for use by the vessels of His Majesty's Navy.

The only British coal imported into Ichang has been Welsh coal for the use of British men-of-war; but the contract for this has now expired, and its import has ceased, for the reason mentioned above.

3. —.

4. The average price of Ch'ungking coal here is about 25s. per ton, but this will be much reduced with improved facilities for transport.

5. None.

6. The importation of British coal has ceased owing to British vessels of war here now being supplied with Ch'ungking coal.

7. There are no railways in this district.

8. The only coal imported into this district is for steamers' use, and for this purpose Japanese and Chinese coal are exclusively employed. British coal cannot hope to compete in this trade, on account of its price, which is due to the high rates of freight prevailing between England and the East.

9. None.

10. —.

KIUKIANG.

Extract from dispatch, dated Kiukiang, 22nd September, 1904, from Mr. W. J. Clennell, H.B.M.'s Consul at Kiukiang.

The amount of coal that passed through the Customs in 1903 was 2,514 tons, net imports, of which 2,362 tons were of foreign, that is Japanese, origin. The remainder is native coal from places in Hupei. In addition to this, a certain amount of native coal from places in this province comes by junk or by road transit, and does not figure in the Customs returns. If we place the coal consumption per annum of Kiukiang at 3,000 tons, the error will probably not be considerable. The largest consumers are two Russian tea factories, but the Poyang Lake launches take a great deal.

Until the end of last year Messrs. Jardine, Matheson & Co. used to keep a small stock of Cardiff coal (100 tons) for the use of His Majesty's Navy, but this has been discontinued. I do not know of any other British coal ever having been used in this district, nor is it likely that British coal could compete in price, either with Japanese or native varieties.

The only railway in the district is a small native concern at P'inghsiang, some 200 miles from the port. It is, indeed chiefly used for the carriage of coal and coke, but only for the P'inghsiang mines to the Siang River, and I do not know what the charges for carriage are, or, seeing that the mines and the line are parts of the same enterprise, whether any charge is made.

The Customs duty on Asiatic coal is Taels 0·25 a ton: on other kinds Taels 0·6 a ton. Seventeen tons were re-exported in 1903. There is no exportation of coal of local origin.

KIUNGCHOW.

Enclosure in dispatch, dated Kiungchow, 9th September, 1904, from Mr. M. Hughes, H.B.M.'s Acting Consul at Kiungchow.

1. The total consumption is about 750 tons per annum. The Chinese Government import about 500 tons for their revenue cruisers and gunboats. The French firm of A. R. Marty & Co. take about 100 tons for their steamers, and the German firm of Jebsen & Co. take about 150 tons also for their steamers. These two firms sell a small quantity (about 15 tons) in a year, for domestic purposes.

2. Japan *via* Hongkong.

3. No British coal or coke has been landed in this district during the last ten years.

4. No coal has been delivered into railway trucks.

5-8. See No 3.

9. No coal or coke is exported from this district.

10. Hainan cannot be regarded as a market for coal. There are no factories: the domestic consumption is nominal; and steamers trading here can coal more conveniently at Hongkong or Haiphong.

KUEICHOW.

Enclosure in dispatch, dated Yunnan-fu, 24th September, 1904, from Mr. H. Wilkinson, H.B.M.'s Consul-General at Yunnan-fu.

Coal is found in various parts of the province, but chiefly in the centre, east, and north-east.

Only one foreign company is engaged in exploiting the mineral resources of Kueichow—the Anglo-French Quick-Silver and Mining Concession. In this Company's latest published Report (to Aug. 31st, 1902) it is stated that "little attention has yet been paid to the deposits of coal"; but the General Manager (a British subject) at the Wan-shan-ch'ang Mines, in Eastern Kueichow, has sent me the following information.

Extract from a letter enclosed in Mr. Consul-General W. H. Wilkinson's dispatch, dated Yunnan-fu, 22nd November, 1904, from Mr. Henry Brelich, General Manager of the Anglo-French Quicksilver and Mining Company in Kueichow, giving information in regard to the Coal Supply of that Province.

Wan-shan-ch'ang,
Kueichow,
Oct. 23, 1904.

Kueiyang is probably the largest consumer of coal in this province, and during my stay there I estimated, very roughly, that the consumption per month would not exceed 400 tons, all of course used for domestic purposes. The coal is bituminous and is made into coke at the mines, and as such brought by ponies and mules to the capital. Coal is used in many other towns of the province, and I mention below the names of the most important ones: Wu-ch'uan, Tu-yun, Kuei-ting, Lung-li, An-shun (anthracite), Tsun-yi.

Even a rough estimate as to the probable consumption of those places cannot be attempted. The fuel is used for domestic purposes only, with the exception of Wu-ch'uan, where it is said to be used at the quicksilver mines near that place, for retorting the quicksilver from the ore. No British or other coals or coke have to my knowledge ever been imported into, or exported from, Kueichow. Coal is largely distributed throughout this province, but there is at present very little use for it, and it is exploited in a very small way.

The absence of industries makes the importation of this kind of fuel unnecessary, but even in the event of the creation of industries, the vast fields surrounding Kueiyang, and those of many other localities would, if opened up, yield a supply ample for all such purposes.

I believe that I have drawn your attention to the enormous extent of the coal-fields situated near the capital, and some distance beyond it in a south-westerly direction, and I consider this is one of the best assets the province possesses. Eventual facilities for transport would, I believe, enable Kueichow to become an important supplier of coal and coke.

NEWCHWANG.

Enclosure in dispatch, dated Newchwang, 17th September, 1904, from Mr. H. A. Little, H.B.M.'s Consul at Pakhoi.

1. The import of coal into Newchwang in 1903 was as follows:—

	Tons.
Foreign (mostly Japanese)	68,000
Native (from Fuchow, Liao tung-Peninsula, and Tongshan)	48,000
Total	116,000

A decrease of about 40,000 tons compared with the previous year, Of the foreign coal some 50,000 tons were for the Manchurian railway. The balance of 66,000 tons, with the addition of a few hundred tons which arrived from the interior by cart or junk, probably represents the amount consumed locally. The natives also use a considerable amount of charcoal—perhaps 500–1,000 tons a year.

The quantity used for manufacturing purposes it is impossible to ascertain with any certainty, but it probably does not exceed 15,000 tons. There are five bean mills worked with foreign machinery, the largest of which burn 1,000–2,000 tons per annum, and about forty native mills, which now also use coal, but their consumption must be comparatively small. There are no other foreign factories in operation.

The quantity imported into Dalny in 1903 was about 133,000 tons, a large part of which was probably British.

2. This question is partly answered above. Up to 1900 the annual importation by steamer did not exceed about 30,000 tons, from Japan and Tongshan, but a considerable quantity—perhaps 2,000–3,000 tons—was obtained from the Yentai mines near Liao-yang. Just before the outbreak of war the output there was some 300 tons a day, nearly all of which was taken by the railway. Formerly Newchwang drew a large part of its supply from the Fuchow mines, but no statistics exist of the quantity obtained from them till the year 1900, when 27,000 tons were imported.

3. As appears from what has been said above, little or no British coal has ever been imported into this port.

4. The retail prices of native and Japanese coal during the last few years up to the outbreak of war have varied from $9–$14 a ton.

5. —

6. —

7. As far as is known there are no differential rates on the carriage of coal. On the Manchurian line it is believed there has been no traffic in this article; on the Chinese line the rate is $1\frac{3}{4}$ cents. a mile per ton.

8. —

9. —

10. With the large mines at K'aip'ing and Tongshan within two or three hundred miles, and numerous smaller mines worked by natives all over the country, the output of which will no doubt be greatly increased with improved methods, I do not think there is any market for British coal in this district. The conclusion of the war will almost certainly bring about a great development of the mining industry in Manchuria, and, with the help of foreign capital and foreign skill, the local production of most minerals in common use will probably be sufficient for local needs.

NINGPO.

Enclosure in dispatch, dated Ningpo, 8th September, 1904, from Mr. R. H. Mortimore, H.B.M.'s Consul at Ningpo.

1. The import of coal into Ningpo in 1903 was 3,272 tons of Japanese and 1,815 tons of Chinese coal:—total, 5,087 tons. The average import for the past ten years is 9,036½ tons. It is almost entirely used for manufacturing and steam purposes.

2. The supply for the past ten years was as follows:—

Year.	Japanese Coal.	Average value at 1s. 10d. per $	Chinese Coal.	Average value at 1s. 10d. per $
	Tons.	£ s. d.	Tons.	£ s. d.
1903	3,272	1 3 4½	1,815	1 7 6
1902	4,280	1 2 0	1,908	1 1 6½
1901	11,924½	1 2 7½	430	1 1 7½
1900	11,314	1 2 0	532	1 2 0
1899	12,048	18 4	784	1 2 0
1898	10,732½	18 4	603	1 2 0
1897	6,302	13 9	5,344	1 2 0
1896	6,474	17 5	3,818	19 3
1895	1,658	18 4	3,876	18 4
1894	858	16 6	2,393	18 4
	68,863	19 3	21,503	1 1 5½

3. No British coal imported.

4. See reply to Question No. 2, Average Value columns.

5.
6.
7.
8. } None.

9. No coal or coke is exported.

10. The duties on imported coal are as follows:—

Asiatic and Japanese coal—
Haikuan Taels - 0·250 = 8¼d. per ton.

Other kinds of coal, foreign—
Haikuan Taels - 0·600 = 1s. 7¾d. per ton.

Asiatic Briquettes—
Haikuan Taels - 0·500 = 1s. 4½d. per ton.

PAKHOI

Enclosure in dispatch, dated Pakhoi, 23rd October, 1904, from Mr. M. Hughes, H.B.M.'s Acting Consul at Pakhoi.

1. The average for the last ten years is about 400 tons per annum, of which say 20 tons per annum is used for domestic purposes. The rest was employed for steam purposes.

2. Japan.

3. No coal is purchased inland.

4. No coal is delivered in trucks.

5. None.

9. There are no exports in coal or coke.

10. The Consular district of Pakhoi as a coal market may be disregarded.

SHANGHAI.

Extract from dispatch, dated Shanghai, 20th October, 1904, from Sir Pelham L. Warren, K.C.M.G., H.B.M.'s Consul-General at Shanghai.

1. The present consumption of coal at this port as measured by the annual import is, according to the Customs Returns:—

	Tons
1899	406,838
1900	243,299
1901	435,289
1902	412,428
1903	501,364

By far the greater proportion of coal, say 80 per cent., is used for steam purposes. The Chinese use coal in their tea shops and for blacksmith work, etc., but the amount cannot be very large, as also the quantity used by the 7,000 foreigners in Shanghai for domestic purposes must be very small.

2. It has been impossible to obtain details of the sources of supply during the last ten years, but the coal imported during the last five years is given below:—

British coal:—The stocks at present in port are some 36,000 tons of Welsh coal. About 16,000 tons of this is held by contractors for His Britannic Majesty's Navy, the German and other navies, the remainder being available for purchase.

Japan coal:—There are about 150,000 tons in stock, of which 50,000 to 60,000 tons are held by local steamer companies, and probably about 20,000 to 55,000 tons are held for mills and other local industries.

	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.
Britain	31,191	33,611	37,147	21,125	47,669
Australia	19,584	15,580	30,772	12,653	10,842
Japan	549,468	479,206	677,899	661,986	792,596
Kaiping	65,731	23,887	34,742	82,410	55,295
Szechuen	44,168	29,252	45,048	38,431	37,367
Hongay	5,083	7,443	9,490	12,603	8,592
Total	715,225	588,979	835,098	829,208	952,361
Re-export	308,387	345,680	399,809	416,780	450,997
Net Total	406,838	243,299	435,289	412,428	501,364

Australian coal:—The local stock is about 9,000 tons, which is only used by the docks for their blacksmith work.

3. No British coal is sent inland, except such as goes to Hankow or other river ports for the use of the warships of the foreign powers which may happen to need it. The transport is entirely by steamer.

4. It is impossible to obtain the statistics to give an adequate answer to this question. The prices ruling during 1903 were from Taels 16·00—18·50 (£2. 2s. 2d.—£2. 8s. 9·06d.) per ton ex godown. Of course, as no coal is carried inland, the question of prices as delivered into trucks does not come into consideration.

The prices mentioned above are, however, not the maximum and minimum prices realised. I give the following as an example of the state of the British coal trade at this port. A newly built ship on being sent out to her owners carried, as part of her cargo, coal. It was only a matter of about 1,500 tons, but at the time no one wanted English coal; so it was ultimately sold for the low price of Taels 11·50 (£1 10s. 3·68d.) a ton. Then, again, an American warship came into harbour and demanded a particular brand of Welsh coal—would have no other. There was little or none of that coal in the market, and the high price of Taels 22·50 (£2 19s. 3·56d.) a ton was realised. These were exceptional sales.

Prices of other coals during 1903 were:—

	Taels.	s.	d.	s.	d.
Australian coal	12·00—13·00	31	8·5	—34	3·12
Japan coal	4·00— 8·50	10	6·5	—22	4·81
Szechuen coal	8·00— 8·75	21	1	—23	0·72
Kaiping coal	4·50— 8·00	11	10·31	—21	1
Hongay coal	8·00—10·00	21	1	—26	4·25

5. British coal is imported only for supplying the bunkers of warships. During 1903, 8,132 tons were supplied to His Britannic Majesty's ships, while a reserve of 2,500 tons must be held by the firm which contract for the supply of His Britannic Majesty's warships.

6. There is only British Admiralty listed coal imported into this place for the use of warships, and the amounts used fluctuate according as the number of warships entering this port is great or small.

7. There are no railways here along which coal is transported.

8. The British coal trade in this district depends solely on the requirements of warships frequenting this port. Even foreign men-of-war do not use English coal exclusively, for they can obtain a good Japanese coal for half the money it costs to buy English coal, and the difference in consumption bears no adequate proportion to the difference in price.

English coal can never be used commercially in this district, as it is too expensive, and consequently the trade in it must always be bounded by the requirements of a user to whom the best steaming smokeless coal is an essential, no matter what is the cost.

SWATOW.

Extract from dispatch, dated Swatow, 15th September, 1904, from Mr. R. Willis, H.B.M.'s Acting Consul at Swatow.

British coal is not imported into this district.

The annual consumption of coal here averages about 60,000 tons; it is of Japanese origin, and used almost entirely for steamer purposes.

There would seem to be no opening for the import of British coal under present conditions.

TIENTSIN.

Enclosure in dispatch, dated Tientsin, 12th September, 1904, from Mr. H. E. Fulford, C.M.G., H.B.M.'s Acting Consul-General at Tientsin.

1. It is impossible to state the present consumption of coal in this consular district. The district comprises the provinces of Chihli and Shansi, with a population of forty to fifty millions.

No statistics of any kind are kept by the Chinese authorities.

2. The source of supply for the past ten years up to the end of 1903, so far as this town and the neighbouring country are concerned, has been the Kaiping Coal mine, situated at a distance of eighty miles by railway to the north-east.

Peking and its neighbourhood are served by native coal mines in the hills, twenty to thirty miles to the westward of that place.

Coal is found in many parts of Shansi and local supplies are drawn from local mines.

3 British coal has not been in use here for the past ten years, and it has not penetrated into the interior at all.

7 There would be no differential rates, but no British coal is carried.

8. I do not see how British coal can compete with the cheap local supplies, particulars of which are given below. This local coal has driven all foreign coal, including Japanese coal, out of the market.

9. The British company working the Kaiping mines, the Chinese Engineering and Mining Company, report that during the past year they sent by sea to other ports of China 160,000 tons of coal, and that the annual quantity so distributed is increasing. Their total output is close upon 1,000,000 tons annually.

The retail prices of this coal in Tientsin are :—

Household lump coal - -	18s. 4d. per ton
Small coal - - - -	10s. 0d. ,, ,,

For export the following are the prices free on board at Tongku :—

Naval lump coal for men-of-war -	29s. 4d.
"Loco" lump coal ,, ,, -	22s. 0d.
"Bunker" coal for merchant vessels	13s. 0d.

But there is no doubt that the company could quote much lower rates and yet make a profit. At present there is no competition.

10. The import duty on European coal in China is equivalent to 1s. 7d. a ton; on Asiatic coal it is equivalent to 8d. a ton. These rates are calculated on the basis of 5 per cent. *ad valorem*, but are specific.

WENCHOW.

Extract from dispatch, dated Wenchow, 26th October, 1904, from Mr. R. H. Mortimore, H.B.M.'s Consul at Ningpo.

The import of coal is so insignificant, that no mention is made of it in the Customs Returns. The small amount imported is entirely used by foreigners for heating and cooking purposes.

WUCHOW.

Extract from dispatch, dated Wuchow, 9th September, 1904, from Mr. F. E. Wilkinson, H.B.M.'s Acting Consul.

1. In the absence of any official statistics on the subject it is difficult to give an exact estimate of the total amount of coal consumed per annum in this district, but it does not exceed 10,000 tons. The whole supply is used for steam purposes.

2. The sources of supply have been Japan and a native mine situated not far from this city. From Japan, 7,869 tons were imported last year.

3, 4, 5, 6, and 7. As no British coal is imported these questions require no answer.

8. I do not see any opening for British coal, for which there is no local demand.

9. There are no exports of coal or coke from this district.

10. I have no information to give which may be of value to the Commission.

WUHU.

Enclosure in dispatch, dated Wuhu, 13th October, 1904, from Mr. W. P. Ker, H.B.M.'s Consul at Wuhu.

1. Annual consumption at the port of Wuhu about 13,100 tons; 8,100 tons for domestic purposes, and 5,000 tons for steam purposes.

2. No information for each year. The following figures are said to indicate roughly the amounts consumed at Wuhu annually from the various sources of supply:—

For steam purposes:

From Japan 5,000 tons (market price $11 to $12 50 Mex.), say 20s. to 23s.

For domestic purposes:

From Hankow Anthracite 100 tons. Used chiefly by foreigners. (Price $14 to $15: say 26s. to 28s.)

From Hupei and Hunan. Soft, 5,000 tons. (Price $7 to $8: say 13s. to 15s.)

From mines in the interior of this Province (Anhui). Soft 3,000 tons. (Price $8 to $9: say 15s. to 17s.)

3. British coal is only used in men-of-war.

4. There are no railways. The prices of any British coal delivered in Wuhu to men-of-war are arranged at Shanghai or elsewhere, and there are no quotations here. Cardiff coal would probably cost about $26 (48s.) a ton.

5, 6, 7. See replies to Nos. 3 and 4.

8. No.

9. The exports of coal from Wuhu according to the Imperial Maritime Customs Returns (*i.e.*, in vessels of foreign type) for the last ten years are as follows:—

Year.	Tons.
1894	668
1895	3,857
1896	3,097
1897	793
1898	564
1899	1,849
1900	1,091
1901	1,626
1902	1,143
1903	225

10. Import duties in China are as follows:—

	Per ton.
Coal, Asiatic	Haikwan Taels 0·25 (7·9d.*)
Coal, other kinds	,, ,, 0·60 (1s. 6·9d.*)
Coal, Asiatic Briquettes	,, ,, 0·50 (1s. 3·8d.*)
Coke, Asiatic	,, ,, 0·50 (,, ,, *)
Coke, other kinds	,, ,, 0·90 (2s. 4·4d.*)

"There are no statistics published on this subject, and the information, which is gathered from Chinese sources, is necessarily incomplete and conjectural."—(*Extract from Mr. Consul W. P. Ker's dispatch*).

(* At the average exchange for 1903, 3s. 7⅝d.).

YUNNAN-FU.

Enclosure in dispatch, dated Yunnan-fu, 24th September, 1904, from Mr. W. H. Wilkinson, H.B.M.'s Consul-General at Yunnan-fu.

1. The consumption of coal has been so far solely in the hands of Chinese, and statistics are therefore, it is hardly necessary to say, not available. Coal is used for domestic purposes in the prefectures whence it chiefly comes (see Q. 2), but in the city of Yunnan only at a few of the *yamen* (official establishments). At the Arsenal and the Mint, powdered coal ("slack") is employed to some extent; but here, as elsewhere in the Province, wood or charcoal is preferred for smelting. Rooms are heated by means of portable charcoal braziers.

2. Coal is found in several prefectures, notably Chao-Chao-t'ung, Tung-ch'uan, and Ch'ü-ch'ing, in the north-east of the Province, adjacent to the province of Kuei-chow and Lin-an, bordering on Tongking. Some of this coal is said to give out suffocating effluvia when first lit, while other kinds (as at Hsüan-wei, P'ing-yi, Chan-i and Ch'ü-ch'ing) is harmless. Both kinds are used for preparation of food and for smelting.

3. I think I may safely state that not an ounce of British coal, even in the form of coke, has ever entered Yunnan province. The sole means of transportation at present existing in Yunnan are porters and baggage animals (mules, ponies, and donkeys). When the French line reaches the Tongking frontier—in about a year's time—foreign coal will doubtless begin to be introduced for railway use; but it will, almost of course, be the coal of Tongking. As the railway is extended to Yunnan-fu, coal measures in this prefecture (Yunnan) and the pre-

fectures of Lin-an and K'ai-hua will gradually be opened up. (It is said that machine coal has been discovered on the western shore of the great lake near this city.)

4. At present there are no railways completed in this province.

5. Yunnan is an inland province; and though small steamers occasionally mount the Red River as far as the frontier, these steamers are all French, and consume the Hongay and Kebao coal and briquettes of Tongking.

6,7. (See replies to Q. 3, 4).

8. The only hope to establish a British trade in bulky articles of any sort is to continue the Mandalay-Lashio Railway, *via* Kunlong, to Tali and Yunnan-fu. If this is not done, and speedily, the French will extend their railway, now in building, to Tali; and British trade will be restricted to the single prefecture of Yungch'ang, in the far west, adjacent to Burma.

9. There are no exports of coal or of coke from the Province.

10. Speaking generally: Yunnan, particularly the eastern half, contains large beds of coal; but these are at present worked only by the primitive native processes. The advent of railways will bring about great changes, but these will probably result rather in the export of native, than in the import of British, coal. If the Burma railways are extended into Yunnan in the near future, British mining companies and manufacturers of machinery may find a profitable field for enterprise. Meanwhile an Anglo-French corporation, the Syndicat du Yunnan, has secured rights in seven districts, comprising mainly the south-east of the Province; but little has been done, so far, to develop the concession. Surveys have been made on its behalf, by French and American mining engineers, but no mines have been worked.

The present Provincial Government is reactionary and (probably under orders from Peking) is opposed to granting further mining concessions to British or French prospectors.

COREA.

CHEMULPO.

Enclosure in dispatch, dated Seoul, 26th September, 1904, from Sir J. N. Jordan, C.M.G., H.B.M.'s Minister Resident and Consul-General, Seoul.

Report of Mr. A. H. Lay, Vice-Consul at Chemulpo.

1. The present consumption of coal per annum in Chemulpo may be reckoned at about 8,000 tons. The remainder of the quantity imported goes to Seoul and other places inland.

It is difficult to ascertain the quantities used for domestic and manufacturing or steam purposes, but it is thought that they are about 70 per cent. for the former, and 30 per cent. for the latter.

2. Sources of supply in each year during the last ten years up to the end of 1903.

Coal Imports into Chemulpo.

Yen	Year	Source of Supply	Quantity tons	Value £
27,322	1894	Japan	4,493	2,960
18,756	1895	Japan	3,226	2,032
105,333	1896	Japan	10,975	11,411
55,086	1897	Japan	7,072	5,566
320	1898	China	20	32
50,196		Japan	6,841	5 072
541	1899	China	49	54
34,626		Japan	5,277	3,463
66,960	1900	Japan	9,847	6,696
10	1901	China	1	1
51,263		Japan	6,796	5,232
270	1902	China	30	28
92,174		Japan	10,475	9,409
26	1903	China	4	3
102,316		Japan	12,132	10,445

Rates of Exchange:

Yen, 1894–1896 equivalent to 2s. 2d.; 1897–1898, 2s. 0¼d.; 1899–1900, 2s.; 1901–1903, 2s, 0½d.

Practically, therefore, the source of supply has been confined to Japan for the past ten years.

Nearly all the coal comes by junk from Moji and is from the Chikuzen district, but a few boat-loads find their way from Karatsu. Most of the supply is "slack" or "unscreened."

3. The only cargoes of British coal that have come here during the past ten years have been to the order of Messrs. M. Ginsburg and Company, Contractors to the Russian Government. That firm had, prior to the war, storehouses on the south side of Roze Island capable of holding about 2,000 tons of coal. The Russian men-of war which visited this port were in the habit of replenishing their bunkers from this stock. British coal has not penetrated inland at all.

4. The highest and lowest prices for British coal were

1894 - -	£4 6s. 8d. and £3 5s. 0d. per ton
1895 - -	idem
1896 - -	idem
1897 - -	£4 0s. 10d. and £3 0s. 7½d. per ton
1898 - -	idem
1899 - -	£4 and £3 per ton
1900 - -	idem
1901 - -	£4 1s. 8d. and £3 1s. 3d. per ton.
1902 - -	idem
1903 - -	idem

As regards Japanese coal, it is impossible to say with any accuracy what were the highest and lowest prices ruling during the past ten years, but, so far as can be learned, it has never been lower than seven Yen (14s.) or higher than fourteen Yen (£1 8s. 9d.) a ton in Chemulpo (that is 1894–96, 15s. 2d.; to £1 10s. 4d.; 1897–98, 14s. 1¾d. to £1 8s. 3½d.; 1899–1900, 14s. to £1 8s.; 1901–03, 14s. 3½d. to £1 8s. 7d.).

5. No proportion of the British coal imported has been shipped afterwards for the bunkers of British vessels.

6. See reply to question No. 3.

7. The railway rate of freight on coal is 5 sen (1¼d.) per ton per mile. The lighterage charge from shore to ship is Yen 1·10 (2s. 3d.) per ton. There are no differential rates for British coal.

8. British coal cannot compete with Japanese coal in Chemulpo.

9. The exports of coal and coke from Corea consist merely of small samples, and no increase is taking place in them. During the years 1894–1903 exports from Chemulpo were :—

Yen	Year	Quantity Tons.	Value £	Destination
	1894	nil	nil	—
	1895	nil	nil	—
	1896	nil	nil	—
	1897	nil	nil	—
	1898	nil	nil	—
23	1899	3	2	Japan
972	1900	148	97	Japan
17	1901	2	2	China
295	—	38	30	Japan
16	1902	2	2	Japan
140	1903	20	14	China

10. The import duty on coal and coke in Corea is 5 per cent. *ad valorem.* (*Extract from Sir J. N. Jordan's dispatch.*)

As will be evident from a perusal of the above Report British Coal Mining interests are but meagrely represented in Corea, the former Russian Coal Depot on Roze Island in Chemulpo Harbour, which has since been seized by the Japanese, absorbing the whole of the British coal which has reached these shores.

No British coal is imported into Seoul, nor, so for as I am aware, has any been imported into any Corean port other than Chemulpo.

As regards the other Treaty Ports, Japanese coal in small quantities, and for domestic purposes only, is imported, with the single exception of Fusan, where a larger quantity is imported for the use of the railway. With the completion of the Seoul-Fusan line, the quantity consumed will, no doubt, increase considerably, but will be confined, as now, entirely to the product of the Japanese mines.

In the absence of Consular Representatives in these ports, I am unable to furnish data regarding the quantity of coal consumed there annually.

JAPAN.

HAKODATE.

Enclosure in dispatch, from Mr. R. G. E. Forster, H.B.M.'s Vice-Consul at Hakodate.

Reporting in 1891, on the coal fields of the Hokkaido (Island of Yezo), a Japanese Government engineer states : —"The quantity of coal contained in the fields thus far examined in Hokkaido is approximately six hundred million tons." Subsequent investigation and development of the coal-mining industry have shown that the deposits in reality far exceed the figures given above. The coal being of good quality and available for use for steaming and manufacturing purposes, there has never, with the exception of small quantities of Admiralty coal, for the exclusive use of His Majesty's ships, been any import of foreign coal into this Consular district. No coal is used for domestic purposes in the district, except by the few foreign residents ; wood being the fuel employed for the small sheet-iron stoves with which the better class of Japanese houses are provided.

There being consequently no question of competition between British and foreign coal in the district, it has not been thought necessary to delay the forwarding of this report by attempting to obtain the statistics asked for in Question I.

Of the remaining questions, a reply to No. 9 would appear to be the only one having any interest for the Royal Commission, so far as this district is concerned. The Hokkaido Colliery and railway company, having a capital of £1,800,000, does a large business in the export of coal at Muroran on the South-east coast of the Hokkaido, the principal coaling port of the district. The following are the total outputs from the above Company's mines during the years named :—

Year.	Tons.
1894	397,153
1895	339,816
1896	423,708
1897	557,844
1898	537,724
1899	547,335
1900	601,158
1901	751,843
1902	888,090
1903	923,544

The Returns of coal exported and supplied to ships' bunkers during the same years are as follows :—

Year.	Exported Tons.	Bunkers Tons.
1894	5,860	720
1895	36,126	4,839
1896	59,086	6,865
1897	106,090	13,142
1898	62,220	—
1899	52,833	12,090
1900	85,985	39,021
1901	101,176	61,203
1902	130,030	43,807
1903	120,886	38,967

It must also be borne in mind that, in addition to the coal exported abroad, large quantities are sent by the Company to Yokohama and other places in the main island of Japan.

The three principal mines of the Company are respectively, at Poronai, Sorachi and Yubari. Of these, Poronai coal is the most suitable as fuel for locomotives and it is used in preference to all others on the Government and Nippon railways. For steamers, the Yubari and Sorachi lump coals are considered best, and unscreened Yubari is also largely used. Vessels engaged in coastwise navigation use chiefly unscreened Sorachi coal and Poronai dust. Large contracts have been made with the Nippon Yusen Kaisha (Japan Mail Steamship Company) and other leading consumers for a supply of the Yubari coal. Abroad, Hongkong and Singapore are the principal markets for this coal. The price of best quality screened Yubari coal, free on board at Hakodate, is at present Yen 9·10 (18s. 7d.) per ton ; the nominal quotation for Cardiff coal being Yen 30 (£3 1s. 3d.)

The Hokkaido Colliery and Railway Company also own a coke factory over twenty-six acres in area, the ovens, machinery, and fittings of which are of the most modern type. The greater portion of the output is consumed in Japan, although a small export of the article figures in the Customs Returns.

In the above calculations, the value of the Japanese Yen has been taken at 2s. 0½d.

NAGASAKI.

Enclosure in dispatch, dated 1st October, 1904, from Mr. Holmes, H.B.M.'s Consul.

1. It is impossible to obtain statistics as to the local consumption of coal. As however this district is not a manufacturing one, and with the exception of the comparatively insignificant number of foreign residents coal is not used in Japan for domestic purposes, being replaced by charcoal, the consumption of coal is principally confined to the shipping calling at this and other ports in this district.

In the port of Nagasaki the number of tons loaded for ships' use, including foreign men-of-war during the last three years, was as follows :—

	Tons.
1901	460,500
1902	413,620
1903	395,659

Separate returns for men-of-war are not available, except for 1903, when out of the total amount of 395,659 tons, 72,612 tons were for the use of warships, the import of coal for that year having been 63,927 tons.

2. With the exception of the coal supplied for the use of warships (other than Japanese) which take the entire import of British coal, the source of supply has been entirely native. The mines in this district, together with that of Shimonoseki (Moji) are the most important in Japan, the output for 1903 from the mines in the Consular district of Nagasaki alone having been over 2,500,000 tons.

The character of the coal produced in this district is for the most part bituminous steam coal.

3. British coal has never penetrated into the country, being imported solely for the use of men-of-war.

4.	British. Highest. £ s. d.	British. Lowest. £ s. d.	Japanese Mitsui Steam Coal. £ s. d.
1899	4 2 1	1 17 0	0 18 6
1900	3 1 7	2 3 1	0 17 6
1901	3 1 7	2 7 2	0 16 5
1902	2 9 3	2 1 0	0 17 6
1903	2 14 5	2 0 0	0 16 5
1904	—	—	0 15 5

(Returns before 1899 not available. Exchange—1 yen @ 2s. 0⅝d.)

5. The British coal imported is solely for the use of men-of-war calling at this port.

6. The import has gradually risen, with the exception of the year 1900, when the import was less than half the average. The average import from 1887 to 1903 was some 46,000 tons. The import for the first eight months of 1904, viz. :—308,900 tons into Nagasaki alone, and probably almost as much into the naval port of Sasebo, in this Consular district, for which returns are not available, is due to the demands of the Japanese Navy during the present war. Until the outbreak of the war the Japanese Navy used almost exclusively native coal.

7. There is no transport of British coal in the district, all the coal imported being solely for naval use.

8. No.

9. The export of coal forms the principal feature of the foreign trade of this district. The figures for the last five years for the three coal-exporting open ports in this district are as follows :—

	Nagasaki. Tons.	Kuchinotsu Tons.	Karatsu. Tons.	Total Tons.
1899	343,000	432,885	71,211	847,096
1900	374,771	562,990	129,537	1,067,298
1901	187,823	487,353	184,296	859,472
1902	171,483	619,014	165,803	956,299
1903	205,271	724,323	270,050	1,199,644

10. There is an import duty of 88 sen. per ton on imported coal, which, at the present rate of exchange, is equivalent to about 1s. 9½d.

American coal (Pocahontas) has been experimentally tried as a substitute for the more expensive British coal, but has made no headway.

The import of British coal, depending as it does on the requirements of men-of-war, can in no way be affected by considerations which might influence other imports.

SHIMONOSEKI.

Enclosure in dispatch, dated Shimonoseki, 9th September, 1904, from Mr. A. M. Chalmers, H.B.M.'s Consul at Shimonoseki.

1. Consumption of coal in 1903.

	Tons.
Steam-ships' bunkers*	778,710
Domestic and Manufacturing use	200,000
Railway use	1,000,000

2. The coal fields in Tukuoka and Oita prefectures in this Consular district.

3. No demand except for Admiralty purposes.

* Note. Exclusive of coal supplied to the Nippon Yusen Kaisha and Osaka Shosen Kaisha Steamers amounting to 920,071 tons.

4. —

5. None.

6. —

7. —

8. —

	Tons
9. Coal exported abroad in 1903	1,904,271
„ „ to home ports „	562,676
Coke exported abroad in 1903	3080
10. Duty on imported coal is	2s. 3d. per ton
„ „ „ coke is	3s. 1d. „ „

TAINAN (Formosa).

Enclosure in dispatch, dated Tainan, 17th November, 1904, from Mr. A. E. Wileman, H.B.M.'s Consul at Tainan.

1. It may be said that the consumption of coal for domestic purposes in this Consular district, which is situated within the Tropic of Cancer, is virtually nil. The climate, which is tropical for at least eight months in the year, does not demand the use of fuel for the heating of houses; and such fuel as is required for the preparation of food, and such like domestic purposes, is confined to firewood and charcoal. The native Chinese and Japanese houses are not adapted or built in any way to suit the requirements of coal consumption, and the native population could not afford to use coal for domestic purposes.

The consumption of coal for manufacturing or steam purposes is also not very extensive, as will be perceived from the following statistics obtained from the Governor of this district for the years 1901 to 1903. I am informed that statistics regarding the consumption of coal earlier than the year 1901 are not obtainable.

Coal used for manufacturing or steam purposes in the Consular district of Tainan during the years 1901 to 1903.

Date	Steam	Manufactories	Total
	Tons	Tons	
1901	1844	209	2053
1902	2408	731	3139
1903	3224	3291	6515
Three years	7476	4231	11707

All the above coal was Japanese coal imported into this Consular district from the Port of Moji in the Island of Kyushu, Japan. The total tonnage of 7476 tons, consumed for steam purposes, was used chiefly on the Formosan Railway and also by a few steam launches plying in this Consular district. The coal used for manufacturing purposes, the total tonnage of which was 4231 tons, was supplied for the use of a large Japanese Sugar Mill, and a Rice Mill and Ice Factory worked by British subjects. There are but few factories in this district, and these mainly consist of small native sugar mills, which for the sake of economy generally use crushed sugar cane refuse for fuel, occasionally supplemented by a small modicum of coal. There has, however, been an increase in 1903 in the amount of coal used for steam and manufacturing purposes in this Consular district owing to the extension northward of the Formosan Railway and to the erection of several new native sugar mills.

2. Reference to the Imperial Japanese Customs Returns for the years 1894 to 1903, a period of ten years, reveals the fact that no British coal has ever been imported into this Consular district. All the coal used in this district consists of Japanese coal imported usually into the Port of Takow from Moji in Kyushu, Japan, chiefly for the use of the Formosan Railway, the southern terminus of which is situated at Takow. According to the Customs Returns previously alluded to, it seems that the import of Japanese coal from Moji into this Consular district was commenced in the year 1901, chiefly for the purpose of supplying coal for the southern section of the Formosan Railway opened in the year 1900 between Takow and Anping. During those years the total tonnage imported was as follows:—

	Tons.
1901	1115
1902	3525
1903	7862
Total	12,537

3. The answer to this question is necessarily brief, as British coal has never been imported into this Consular district and consequently has never penetrated inland.

The facilities for transport existing at present in this Consular district are those provided by the Formosan Railway, the southern section of which runs from Takow in the south to Tarimu, a distance of eighty-one miles to the north. The northern section of the railway runs from Kelung in the north a distance of ninety-five miles to the south, and between the two sections there is a large gap of sixty miles as yet uncompleted. When the railway has been fully constructed throughout the length of the island of Formosa, native Formosan coal will no doubt be introduced into this district from Kelung coal mines, in the district of H.M.'s Consul for Tamsui.

4. No British coal ever having been imported into this Consular district I am unable to reply to the first paragraph of this question. As regards the prices at which other coals were sold during each of the last ten years I am only in a position to give particulars of the prices of the coal imported into Takow, from Moji, Japan, during a period of three years (*vide* Answer to Question 1) from 1901 to 1903 for steam and manufacturing use. It must be remarked that coal cannot be delivered into railway trucks alongside vessels at Takow as there are no facilities for doing so, but is conveyed in lighters for a distance of three miles over the bar and through the lagoon to the railway station depôt. The price per ton for coal so delivered at Takow was during the years 1901 to 1903 as follows—including the cost of transport in lighters, towage and unloading which amounted to about yen 1·80 per ton (=3s. 7d.):—

		£ s. d.
1901	yen 11.80 per ton	= 1 3 7
1902	yen 11.10 per ton	= 1 2 3
1903	yen 10.20 per ton	= 1 0 5

5. No British coal or any other coal is ever shipped at any of the ports in this Consular district for the bunkers of British vessels or any other vessels. No vessels either British or foreign ever coal at any of the ports in this district as no supplies for coaling are kept and local facilities for doing so are bad.

6. No British coals or coke have ever been imported into this district during the last ten years.

7. The railway rate charged by the Formosan Railway Company for the conveyance of Japanese coal landed ex steamer at the Takow Railway station is four sen (or ·96 of one penny) per ton, per mile, and I am informed by the manager of the Railway Company that the same rate would be charged should it be necessary to transport a consignment of British coal, so that there would be no differential rate for British coal. There is not, however, any probability of British coal being imported into Takow.

8. A trade in British coal has never existed in this Consular district and I am at a loss to offer any suggestion as to how it could be started. The consumption of coal is, as will have been observed from the answers to previous questions, comparatively trifling owing, no doubt, to climatic conditions, customs of the natives, and also to the fact that South Formosa is essentially an agricultural district. Taking into consideration the small demand for coal of any kind whatever, I think that there is very little probability of any trade in British coal being developed in this district for many years to come. British coal, although admitted to be far superior in quality to any Japanese coal imported from Moji, cannot, I think, in view of its high price when exported to the East, hope to compete with Moji coal. A cargo of ordinary English coal shipped from Hong Kong the nearest British port, which is three days distant by sea, would cost laid down at Takow somewhere about 27 yen (£2 14s. 0d.) per ton, whilst the best Cardiff coal would cost somewhere about 40 yen per ton (£4 0s. 0d.) These prices include freight and other charges as well as an import duty of yen $1\frac{12}{100}$ per ton (2s. 2·88d.). On the other hand, Japanese coal naturally enters Formosa, which is a Japanese colony, free of import duty; and can be imported from Moji which is only seven days distant by sea, including all charges, at from yen 10 (£1) to yen 12 (£1 4 0) per ton. In the face of the lower prices of Japanese coal and the small demand for coal in this Consular district it seems that there is not much prospect of securing a new market for British coal in this district.

Numerous coal mines exist in the North of Formosa at Tamsui, Taipeh and Kelung in the Consular district of the British Consul for Tamsui, but not much of the coal produced from those mines is used in this Consular district, as preference is given to Japanese coal by the

Formosan Railway Company, which is the principal consumer in this district. Moreover the facilities for conveyance of Kelung coal to this district are confined to transportation by sea. It is to be anticipated however that, when the connection between the northern and the southern sections of the Formosan Railway is completed in the course of three years time, the increased facility for transport will give a decided impetus to the consumption of North Formosan coal in this district and that the use of Japanese coal may possibly be superseded.

North Formosan coal is cheaper than Japanese coal but not of such good quality, and should it come to be used in this district it will be still more difficult for British coal to compete.

9. No coal or coke has ever been exported from this Consular district, as there are no coal mines in existence.

10. The specific import duty on coal imported into this district is yen $1\frac{12}{100}$ (2s. 2·88d.) per ton. There are no other impositions on coal.

TAMSUI.

Enclosure in dispatch, dated Tamsui, 1st November, 1904, from Mr. F. W. Playfair, H.B.M.'s Consul at Tamsui.

1 and **2.** The production in tons of coal in North Formosa from 1896—when the Japanese took over the Island is as follows :—

Year.	Produced locally.	Imported from Japan.	Total.
	Tons.	Tons.	Tons.
1896	1,490	Unknown.	1,490
1897	19,274	,,	19,274
1898	42,261	757	43,018
1899	29,818	7	29,825
1900	41,944	2,801	44,745
1901	65,689	10,531	76,220
1902	96,585	7,992	104,577
1903	81,035	19,751	100,786

The quantity of coal imported from Japan is not absolutely known. The figures given are based upon the Custom's Returns of values, taking an average of six yen (=12s. 6d.) per ton.

The figures for local production are based on the returns furnished to the authorities by the miners, and are believed to be somewhat below the actual output.

The consumption of coal in 1903 is sub-divided as follows :—

	Tons
Ships' use	28,893
Railway ,,	8,291
Factories ,,	17,039
Domestic ,,	18,557
	72,780

The coal supply comes from numerous small mines in the district. The mines lie principally round Kelung, and are, for the most part, surface workings.

A certain amount is also imported from Japan.

3. No British coal has been imported, nor does there seem much likelihood of such being the case, the numbers of foreign steamers visiting these ports being small, while war vessels average one or two per annum, and coal where facilities are greater.

4. See answer to preceding question. The price, per ton of local coal supplied to ships in Kelung Harbour, *i.e*, alongside in boats—not railway trucks,—from 1896 is as follows.

Year.	Lump.		Common.	
	Highest.	Lowest.	Highest.	Lowest.
	s. d.	s. d.	s. d.	s. d.
1896	14 7	13 6	8 4	7 11
1897	12 6	7 4	6 7	6 3
1898	11 6	7 4	6 7	6 3
1899	12 6	11 6	10 5	8 8
1900	11 6	10 5	10 3	8 9
1901	15 2	14 7	10 4	9 4
1902	13 9	13 6	12 11	10 11
1903	12 6	10 5	10 3	9 5

The price is the average market price at Kelung and Taihoku, and is believed to be accurate.

5 and **6** are answered in the reply to question 3.

7. The railway rate for coal from Kelung to Tamsui is about 3s. 3d. per ton, but from Tamsui to Kelung it is only 2s. 9d.

As stated above there is no import of British coal; but if there were, no differential rates as compared with native or other imported coal would be levied; but of course coal imported from elsewhere than Japan has to pay duty.

The import duty on coal is, according to the Tariff, about 2s. 4d. per ton.

8. No.

9. In his Report for 1896 H. M.'s Consul here wrote :—"Coal has practically ceased to be an article of export. The mines are not being worked . . .". In that year the export was only 4,723 tons.

The following Table gives the annual export of coal from this district since 1895 :—

Year.	Tons.	Remarks.
1895	7,751	
1896	4,723	
1897	4,630	
1898	7,772	
1899	18,145	
1900	24,001	Including for ships' use :—
1901	26,205*	*8,831 Tons
1902	31,575*	12,605 ,,
1903	21,947*	11,988 ,,

10. The import duties are fixed by the Customs Tariff; which, can, however, be altered by Imperial Ordinance as far as regards articles the duties on which are not determined by Commercial Treaties, of which coal is one.

From April 1st, 1903, the duty on coal was raised from yen 0.879 (say 1s. 10d.) to yen 1.129 (2s. 4¼d.) per ton.

There is another imposition which might come into force at any time, viz: a consumption tax. This has been already levied on some goods, notably kerosene oil, sugar and woollens, and is generally payable on clearing the goods at the Custom House.

The amount of such tax is entirely at the discretion of the authorities,—although they usually give notice six months before enforcing it,—and their manner of computing same has given rise to some dissatisfaction.

In my opinion North Formosa is not likely to offer any opening for trade in British coal for some time to come.

YOKOHAMA.

Enclosure in dispatch, dated Yokohama, 4th October, 1904, from Mr. E. M. Hobart-Hampden, H.B.M.'s Acting Consul-General at Yokohama.

1. *Consumption per annum.* Japanese coals.

	Tons.
For domestic purposes - - -	15,000 to 20,000
For manufacturing and steam - -	85,000 to 90,000

In both cases the consumption is thought to be increasing.

2. *Sources of supply.*
Moji, Karatsu, Hakata, all in Kiushiu.
Iwaki, Iwaki-no-kuni.
Mororan, Hokkaido.

3. Beyond 500 to 700 tons of Cardiff sent to Tokyo last year—for the manufacture of coke—no British coal has penetrated inland during the last ten years.

4. British coal is delivered alongside vessels in lighters. The prices called for are not obtainable, but in 1904–5 as high as 70s. was offered to my informant.

5. None, except that taken by H.M. Ships.

6. The quantity is not thought to have fallen off on the whole, but is not so large because the U.S. Ships have now their own depôt here for Pocahontas. They used to take Cardiff.

7. No railway rates. 50 per cent. more than for Japanese coal is charged for discharging and landing Cardiff coal, but this is merely because it is dirtier to handle, and does not constitute a differential rate.

8. I do not think anything can be done.

9. No.

10. Import duty, yen 1.129 (2s. 3⅝d.) per ton.

"The figures given and opinions expressed are based on information obtained from a leading British Coal Merchant, who deals both in British and Japanese coal."—(*Extract from Mr. Hobart Hampden's dispatch.*)

MUSCAT.

MUSCAT.

Extract from a dispatch, dated Muscat, 8th February, 1904, from Captain Grey, I.A., H.B.M.'s Consul and Political Agent, at Muscat.

No steam coal is imported into this country for domestic or manufacturing purposes. Some 2,000 tons are brought annually for the use of men-of-war by the British Government, and 800 tons by the French Government for the same purpose.

PERSIA.

BUSHIRE.

Extract from dispatch, dated Bushire, 15th February, 1904, from Lieut.-Colonel C. A. Kemball, C.I.E., H.B.M.'s Acting Consul-General, at Bushire.

As far as can be ascertained no coalfields exist in the Consular district, and no coal is imported into Bushire except for the Government Coal Depôt, received from time to time from the India Office, London, for British ships of war.

KERMAN.

Extract from a dispatch, dated Kerman, 2nd March, 1904, from Major P. Molesworth Sykes, C.M.G., H.B.M.'s Consul at Kerman.

No coal is used in this province nor are there any coal mines.

NASRATABAD.

Extract from a dispatch, dated Nasratabad (Seistan), 10th February, 1904, from Captain A. D. Macpherson, I.A., H.B.M.'s Consul for Seistan and Kain.

There is no consumption of coal of any kind, British or otherwise, in Seistan, and there is therefore no information to give on the subject.

SHIRAZ.

Enclosure in dispatch, dated Shiraz, 12th February, 1904, from Mr. G. Graham, H.B.M.'s Consul at Shiraz.

1. The consumption of coal per annum within this Consular district is nil, the only combustibles used being wood, charcoal, and dried dung.

2.—6. Nil.

7. Nil. No railways.

8. Nil.

9. Nil.

10. There is no import duty in Persia on coal or coke.

TABRIZ.

Enclosure in dispatch, dated Tabriz, 26th January, 1904, from Mr. A. C. Wratislaw, C.M.G., H.B.M.'s Consul-General at Tabriz.

1. None of any sort.

2.—6. None.

7. No railways.

8. I cannot. Freight absolutely prohibitive.

9. None.

10. No information.

TEHRAN.

Extract from dispatch, dated Tehran, 29th March, 1904, from Mr. J. R. Preece, C.M.G., H.B.M.'s. Consul-General at Tehran.

1. The import for domestic purposes alone of coal into the Ispahan district is about three tons annually.

2. This has been about the average for the last ten years.

3. I have no knowledge of any British coal having come into the country.

4.—6. *Vide* above.

7.—9. None.

10. The coal brought into Ispahan comes from Tehran and is supplied by the mines to the north of that town. It is carried on camels and costs in Ispahan about £7 10s. to £8 a ton.

PONDICHERRY *see* FRANCE.

SIAM.

CHIENGMAI.

Enclosure in dispatch, dated Chiengmai, 8th September, 1904, from Mr. C. E. W. Stringer, H.B.M's. Consul at Chiengmai.

1. The present consumption of coal per annum in the Chiengmai Consular district, whether for domestic purposes or for manufacturing or steam purposes, is nil.

Firewood is used for domestic purposes, and there are no manufactures (the only industry of importance being the felling and export of teak timber), and no railways or steamboats in the district at present.

3. British coal has never penetrated into the district at all, as far as I am aware. The facilities for transportation during the last ten years, supposing any coal to have been introduced, have been very poor and expensive, as all bulky goods, such as coal, have to be brought by native boats from Bangkok, the time occupied being about six weeks and the cost about £18 per ton.

7. There are no railways in the district at present. The railway now under construction from Bangkok may enter the district in 1906, but even then it appears probable that firewood will continue to be used for all purposes in preference to coal.

9. There are no coal mines in the district, and therefore no exports of coal or coke.

AFRICA.

ABYSSINIA.

ADIS ABABA.

Extract from Mr. George R. Clerk's dispatch, dated Adis Ababa, 19th February, 1904.

At present no coal is imported into Abyssinia, nor are there any coal mines in the country itself, and it is therefore impossible to answer the Schedule of questions.

There are two important expeditions now prospecting for coal in Abyssinia; an Italian party working to the north-east of Lake Tsana, and an expedition under Mr. Barron, sent by the Soudan Government to explore the country in the east of Abyssinia, leave for which has been granted by the Emperor Menelek to various groups of British concessionaires. The reports of these expeditions will show what prospect there is of any local coal trade.

Should the existing French railways from Jibuti to Diré-Dawa ever be continued to Harrar, it is possible that a certain amount of coal might be sent to that place. Such coal would certainly be sent through French merchants, but the existing railway freights would have to be very greatly reduced before there would be any hope of finding purchasers.

ALGIERS, *see* FRANCE.

AZORES ISLANDS, *see* PORTUGAL.

CANARY ISLANDS, *see* SPAIN.

CAPE VERDE ISLANDS, *see* PORTUGAL.

EGYPT.

ALEXANDRIA.

Enclosure in dispatch, dated Alexandria, 26th March 1904, from Mr. E. B. Gould I.S.O., H.B.M.'s Consul at Alexandria.

1. Present consumption of coal per annum in Alexandria and suburbs :—

For domestic purposes (including the consumption in bakeries and hotels) about twenty tons per day	7,300	tons.
For manufacturing and steam purposes, about	62,700	,,
Total	70,000	,,

2. Sources of supply in each year during the last ten years. From the Customs returns :—

Year.	Country of Origin.	Quantity.	Value.
		Tons.	£
1894	United Kingdom	586,719	447,715
	Belgium	8,860	6,758
	Turkey	60	33
	Total	595,639	454,506
1895	United Kingdom	544,639	373,099
	Belgium	4,887	3,666
	Total	549,526	376,765
1896	United Kingdom	602,439	385,164
	Belgium	8,175	5,247
	France	170	161
	Total	610,784	390,572
1897	United Kingdom	631,688	428,429
	Belgium	858	718
	Total	632,546	429,147
1898	United Kingdom	725,263	563,178
	Belgium	4,997	3,735
	Germany	100	82
	Total	730,360	566,995
1899	United Kingdom	842,413	801,562
	Turkey	951	836
	Belgium	478	575
	Total	843,842	802,973
1900	United Kingdom	731,140	1,010,536
	United States of America	18,564	29,827
	Turkey	10,104	12,500
	Belgium	910	1,808
	Total	760,718	1,054,671

Year.	Country of Origin.	Quantity.	Value.
		Tons.	£
1901	United Kingdom	759,203	888,342
	United States of America	34,215	49,505
	Turkey	15,749	15,213
	Belgium	2,770	3,735
	Germany	519	799
	Total	812,456	957,594
1902	United Kingdom	841,468	787,444
	United States of America	12,612	13,583
	Turkey	2,897	2,091
	Belgium	1,757	2,273
	Germany	100	137
	Russia	13	11
	Total	858,847	805,539
1903	United Kingdom	898,406	793,451
	Turkey	6,025	5,396
	Belgium	4,142	4,248
	Germany	300	400
	Total	908,873	803,495

3. British coal is in use all over the Delta or Lower Egypt, and to a great extent in Upper Egypt.

Previous to 1898, coal could, with difficulty, reach points in the interior of the Delta lying at some distance from the State Railways stations. In 1898 the construction of light railways was begun in the Delta and in the Fayum (Upper Egypt). These have linked up outlying places, and, by through booking arrangements with the State Railways, have considerably facilitated transport.

Up to 1900 a tax was levied on boats carrying produce about the country. Its removal has encouraged competition and greatly reduced the cost of transport. There are no fixed rates for conveyance by boat, the ancient system of bargaining being still adhered to.

Communication by water with Upper Egypt is provided by the Mahmudiè Canal, which reaches the Nile at Atfè, forty miles east of Alexandria.

At the beginning of the ten years under review the railway from Alexandria had only been carried as far as Girgè. Baliana was reached on 1st May, 1896, Nag Hamadi on 1st October, 1896, Kenè on 6th March, 1898, and Shellal, the extreme limit of the State Railways, five miles south of Aswan, on 1st October, 1898. From Luxor to Shellal it is a narrow gauge line.

From Shellal to Wadi Halfa coal is carried on the Nile by gyasa or felucca, and from Wadi Halfa to Kerma (for Dongola) and to Halfaya (for Khartum and Omdurman) by the Sudan Government Railways. This has gone on regularly since the campaigns of 1896–1898. The coal so conveyed has been exclusively British, and has been used almost entirely in Government works, the consumption being about 20,000 tons per annum. The steamers on the Dongola Reach and on the Blue and White Niles burn wood.

4. Quotations per ton of twenty cwt. delivered into railway trucks—including duty, weighing, and all expenses.

Year.	Cardiff.		Newcastle.		Scotch.	
	Highest.	Lowest.	Highest.	Lowest.	Highest.	Lowest.
	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
1894	1 3 9	1 0 6	1 2 6	0 18 6	1 1 0	0 17 0
1895	1 0 7	0 18 3	0 18 1	0 16 9	0 16 10	0 15 3
1896	1 1 9	0 19 7½	0 19 9	0 16 9	0 19 3	0 15 6
1897	1 2 3	1 1 0	0 19 8	0 18 0	0 19 0	0 18 0
1898	1 17 0	1 3 0	1 8 0	0 19 6	1 6 6	0 19 0
1899	1 14 0	1 5 0	1 8 0	1 2 9	1 7 6	1 2 3
1900	2 6 0	1 16 6	2 0 2	1 10 9	1 19 2	1 9 9
1901	1 14 6	1 6 6	1 8 6	1 2 0	1 7 8	1 1 2
1902	1 6 7½	1 4 9	1 1 9	1 0 9	1 1 1½	0 19 6
1903	1 6 6	1 3 3	1 1 6	0 19 3	1 1 0	0 19 0

	Tons.
5. Imported by the Khedivial Mail Steamship and Graving Dock Co., Ltd., in 1903	21,605
Shipped for the bunkers of British vessels other than the Khedivial Mail Steamers, in 1903, estimated at	18,395
Total	40,000

6. Practically the whole import of coal is British, and is increasing, as shown in answer 2; but the import of British coke is decreasing, in consequence of the competition of coke from Turkey and Black Sea ports.

7. The State Railways charge as follows for the conveyance of coal or coke:—

Up to 250 kilometres: 0.015 millièmes per 10 kilogrammes per kilometre;

251 to 450 kilometres:—0.010 millièmes per 10 kilogrammes per kilometre;

Over 450 kilometres:—0.004 millièmes per 10 kilogrammes per kilometre.

These charges are exclusive of station charges, which are at the rate of 0.5 millièmes per ten kilogrammes. *E.g.*, carriage of one metric ton (10 kilogrammes × 100) for a distance of 250 kilometres from Gabbari Quays:—

	millièmes.
Carriage: 0.015 × 100 × 250	375
Station charges: 0.5 × 100	50
	425

£E1—£1 0s. 6.154d (£E0.425)

If the loading and unloading are not done by sender and consignee, an additional charge of 0.2 millièmes per ten kilogrammes is levied for handling operations.

The trucks in use on the State Railway are of five, ten, fifteen, twenty, and thirty tons capacity.

There are no differential rates for British as compared with other coal.

8. No, seeing that, as stated above, practically the whole import is British and is increasing.

9. Less than 20,000 tons are exported (transhipped) none of it being native coal—to Syria, Cyprus, Crete, etc. These exports are not increasing. No abatement or return of customs duty is allowed.

10 The import duty is 8 per cent. ad valorem. The value is estimated by agreement between the customs authorities and the importers. There are also quay dues amounting to about ½ per cent. The competitive power of British coal is not affected thereby.

CAIRO.

Enclosure in dispatch, dated Cairo, 22nd February, 1904, from Mr. A. D. Alban, H.B.M.'s Consul at Cairo.

1 In the absence of statistics and records it is not possible to estimate the amount of coal consumed in the Consular district of Cairo—coal is imported from the sea coast into Cairo, and the towns and villages within the Cairo Consular district by the railway or by the Nile either directly or through Cairo. The total quantity transported by the Railway Administration in 1903 amounted to 720,247 tons (of 1,000 kilogrammes), of which 524,602 tons were for the trade, and 197,645 tons were for the use of the railways. No record appears to be kept locally of the coal arriving in the towns and villages in the interior by water. It is only possible to estimate the total consumption of the country from the statistics obtainable at Alexandria and Port Said, and an accurate estimate of the consumption of coal in each particular Consular district is not obtainable.

There can be no doubt that in the Cairo Consular district the consumption is large and increasing. The railways, the Cairo tramways, the gas and other lighting companies in Cairo and the Consular district, the various pumping stations on the Nile, the steam transport companies on the Nile, the engineering works and foundries and various industries are continually increasing in importance, and in the extension of their operations, and consequently there is an increasing demand for coal.

The consumption of coal for domestic purposes is also on the increase, though in Cairo its use for heating purposes is limited to the very brief cold season. The use of coal instead of charcoal for culinary purposes is increasing. Coal for domestic purposes is sold retail at P.T. 9 per cantar (which is about 100 lbs.), making P.T. 198 per ton for the retailers who purchase the coal at Alexandria at a rate of, on an average, about 20s. per ton free on railway trucks, the coal used for domestic consumption being Lancashire coal. The freight from Alexandria to Cairo amounts to P.T. 37½ per ton, and to this must be added the cost of cartage to stores which comes to P.T. 6 or P.T. 7 per ton, making a total additional cost of P.T. 43½ or P.T. 45 per ton. So that the total cost to the retailer is about P.T. 140 per ton (which at P.T. 97½ to the £1 = £1 9s. 8$\frac{1}{3}$d.) and he sells at about P.T. 198 per ton (or £2 0s. 7$\frac{5}{11}$d.) (P.T. means piastre).

2. For Cairo and district it is not possible to obtain statistics or records on this point.

3. During the last ten years British coal has penetrated as far as the Soudan and, since the re-opening of that country, as far as Khartoum.

The transport is effected chiefly by Nile boats of 30 to 60 tons carriage capacity. The means of transport are by railway or by Nile boats, and the river transport is steadily increasing.

4 and 5. Questions 4 and 5 do not apply to the Cairo Consular district. With regard to No. 4 it would be necessary to add about 10s. per ton to the prices given by the Alexandria Consulate to find the Cairo prices.

6. The quantity of British coal imported into Cairo and the district is known to have considerably increased.

7. The railway rates on coal in general per ton (of 1,000 kilogrammes) are as follows:—

Kilometres.	Per Kilometre.	£	s.	d.
From 1 to 250*	15 millièmes	—0	0	3$\frac{3}{5}$
„ 251 to 450	10 „	—0	0	2$\frac{2}{5}$
„ 451 to 600	4 „	—0	0	0$\frac{24}{25}$
„ 601 and above	4 „	—0	0	0$\frac{24}{25}$

No differential rates exist, native coal being practically unknown. Coal is said to have been found in Keneh and a concession has been granted for working the mines, but as yet nothing is known as to the quality or quantity.

8. British coal has, I am informed, no reason at present to fear competition on the Cairo market. It is probable that the reduction of the rates of transport by rail to Cairo which, as stated above, amount to nearly 10s. per ton, would increase the consumption, and no doubt this remark applies also to many towns and villages in the Cairo Consular district.

The rates of transport by water are lower than by the railway, but I am told that the economy effected by the former mode of transport is largely absorbed by the increased cost of cartage owing to the distance of the landing stage from the stores.

9. There are no exports of coal from the Cairo district.

10. There are no import duties other than the duty paid at the seaports, which is 8 per cent. ad valorem.

* This is the rate from Alexandria to Cairo.

PORT SAID.

Enclosure in dispatch, dated Port Said, 21st January, 1904, from Mr. D. A. Cameron, H.B.M.'s Consul at Port Said.

1. The present annual consumption of coal at Port Said may be estimated at 1,200,000 tons, of which about 1,100,000 tons are used by ships in transit, and the remaining 100,000 tons are imported through the Custom House for local consumption here, and at Damietta for the Eastern branch of the Nile.

2. The supply for the last ten years and, indeed, since the opening of the Suez Canal in 1869, has been almost entirely from South Wales, with a little from the Tyne district, and in 1903, a small quantity of Westphalian coal from Rotterdam. Native Egyptians imported some 4,000 tons of North Country coal in 1903, and the P. &. O, Company imported about 30,000 tons of Durham unscreened which, I understand, they use in addition to Welsh coal.

3. Hitherto the British coal imported into the interior of Egypt has been landed at Alexandria. A small relative quantity, perhaps 50,000 tons, principally dust and smaller pieces from the heaps in the coal yards, is shipped here in sailing barges for Damietta, whence it penetrates up the eastern branch of the Nile for use with machinery, especially in pumping-engines for irrigation.

No coal has hitherto been imported inland from Port Said by railway; but after 1904, when the ordinary-gauge railway will have been opened, it is probable that Port Said may compete with Alexandria for the coal supply of the interior by rail.

4. Nil. This question does not apply to Port Said, as coal for vessels is brought by sea.

5. Some 250-260 British colliers, of about 4,000 tons of coal cargo each, arrive with 1,100,000 to 1,200,000 tons of Welsh coal annually from Cardiff or Barry for the use of ships in transit through the canal, the coal being imported on contract for regular customers of the six shipping and coaling firms at Port Said. These firms are:—*British*, 3. Cory Bros. Ltd., Wills & Co., Ltd., Lambert Bros., Ltd.; *French*, 2. Worms & Co., L. Savon and Co.; *German*, 1. Deutsches Kohlen Depot, under the auspices of the German Government.

All vessels, British and foreign alike, are supplied with Welsh coal, the percentage of British vessels being 60.2 of the total net tonnage in transit. Thus eleven-twelfths of the coal imported is at once shipped into bunkers.

6. No decrease, but steady increase of coal imported, the amount varying according to strikes or the price of freights.

The approximate totals of coal imported for the last five years may be estimated as follows:—

1899	-	-	-	-	1,075,000	tons
1900	-	-	-	-	1,089,000	„
1901	-	-	-	-	1,108,000	„
1902	-	-	-	-	1,063,000	„
1903	-	-	-	-	1,204,000	„

7. Nil. This question does not apply to Port Said.

8. The British Welsh coal trade at Port Said for shipping in transit has no serious rival. The German D.K.D. Company imported, say, 88,000 tons in all during 1903, of which 38,000 were Westphalian coal from Rotterdam.

It is said that Westphalian coal-owners are taking shares in this company in order to push the sale of their coal. When the railway opens they may be able to compete inland, but this seems very doubtful. Owing to its superior quality Welsh coal will always hold the market; but strikes are disastrous to our exporters and agents, and would for a time benefit foreign Westphalian competitors.

9. No. The local Gas Company makes and sells a little coke for local consumption.

10. L. Savon & Co. imported some American coal during the Taff Valley Railway Strike. A cargo was imported at, say, 35s per ton and sold by auction (damaged) at 18s., as there was no market here, owing to coaling firms being under contract to supply Welsh coal for bunkers.

The German Coaling Agency established here in 1902 is the result of a German syndicate for coaling nearly all German ships. One or two British agencies have suffered from the appointment of a German rival, but most of the coal is, nevertheless, British. The syndicate includes the Nord Deutscher Lloyd, Hamburg American, Hansa, and Deutsche-Australie Lines; but the Deutsche Ost Afrika (D.O.A.) Line still retain Cory Bros. as their agents.

The German agency is, as yet, only doing a small business as compared with its English rivals.

The general import duty in Egypt is 8 per cent. ad valorem; but coal brought by sea into harbour and used by shipping in transit pays only 1 per cent. duty.

Suez.—Comparatively few vessels coal at Suez, except men-of-war, whose depth of draught prevents them from coaling at Port Said before passing through the Canal southwards. Occasionally a collier discharges all or part of its cargo at Suez; but, as a rule, only small stocks of one or two thousand tons are kept at Suez, these being replenished when necessary by barges sent laden from Port Said. The coal is almost entirely Welsh.

LIBERIA.

MONROVIA.

Extract from dispatch dated Monrovia, 12th February, 1904, from Mr. Errol MacDonell, H.B.M's Consul at Monrovia.

I regret that it is impossible to answer the ten questions categorically, as in nearly every case they are inapplicable.

There are no manufactories, railways, steam vessels, or other agencies for the consumption of coal. I can safely say that there are not two tons of coal consumed yearly in the entire Republic.

MADAGASCAR, *see* France. (Antananarivo and Tamatave.)

MADEIRA, *see* PORTUGAL.

MOROCCO.

TANGIER.

Enclosure in dispatch dated Tangier, 13th February, 1904, from Mr. Herbert E. White, H.B.M's Consul at Tangier.

1. Average amount of coal imported at Tangier during the last five years, 1,165 tons; of this amount about 350 tons is for domestic purposes, the remainder being for steam mills and steam ships.

At Laraiche about twenty tons are imported annually for a steam launch, otherwise no coal is imported in this district.

2. In each of the last ten years the coal imported was principally Cardiff steam coal, but in the years 1894, 1896, and 1900 some coal was also brought from France; in 1894, 1895, 1896, 1897, and 1900 some from Spain, and in 1901 and 1902 some from Belgium.

3. Coal has not penetrated inland at all, as there is no mode of transport except camels, horses, and mules with pack saddles, and roads are bad.

4. There are no railways in Morocco. Highest and lowest price during the last ten years of coal on hulk in Tangier Bay, duty not paid, were thirty-six shillings and twenty-five shillings respectively. The price charged for coal delivered on shore, duty paid, is forty-eight shillings.

5. It is very rare that any of the coal is shipped for bunkers of British vessels.

6. The quantity of British coal imported at Tangier last year was above the average, viz., 1,337 tons.

7.—

8. The quantity of coal imported can never be large, as vessels would always go to Gibraltar to coal, there being no faculties here, the coal hulk being moored in the open bay which renders operations difficult, except in very fine weather. The absence of railways or even wheeled traffic prevents the penetration of coal into the interior.

9. No coal or coke is exported.

10. Import duty on coal is 10 per cent ad valorem.

MOZAMBIQUE, *see* PORTUGAL.

PORTUGUESE EAST AFRICA, *see* PORTUGAL.

PORTUGUESE POSSESSIONS IN WEST AFRICA, SOUTH OF GULF OF GUINEA, *see* PORTUGAL (LOANDA.)

REUNION, *see* FRANCE.

SENEGAL, *see* FRANCE. (DAKAR.)

SOMALILAND.

BERBERA.

Extract from dispatch, dated Berbera, 18th March, 1904, from Mr. W. Malcolm Jones, H.B.M.'s Acting Consul at Berbera.

1. No coal has ever been imported into or exported from any port in British Somaliland.

2. No coal has been discovered in any part of the Protectorate.

3. In the present state of development of the country it is unlikely that coal will be required in any part of the Protectorate for some years to come.

4. The nearest British port of supply would be Aden.

TRIPOLI, *see* TURKEY (BENGHAZY AND TRIPOLI.)

TUNIS.

BIZERTA.

Enclosure in dispatch, dated Tunis, 3rd March, 1904, from Mr. E. J. L. Berkeley, C.B., H.B.M.'s. Consul-General at Tunis.

Report of Hon. Terence Bourke, Vice-Consul at Bizerta.

1. 15,000 tons of coal imported per annum, all used for steam purposes.

2. Cardiff 5,000 tons, French patent fuel 10,000 tons.

3. No coal goes inland from here.

4. No coal is taken into railway trucks at this port;

5. All the British coal imported is used for bunkering.

6. The importation of British coal has increased in the last ten years.

7. If British coal was sent anywhere by railway, it would be charged the same rates as the other heavy merchandise, which is 7d. a kilometer.

8. The British coal trade would increase if more ships came to this port for bunkering.

9. No export of coal from this port.

10. Every encouragement and facility is given for the importation of British coal for bunkering purposes. There is no consumption for any other purpose worth considering. The French patent fuel is used by the French Navy.

SFAX.

Enclosure in dispatch, dated Tunis, 3rd March, 1904, from Mr. E. J. L. Berkeley, C.B., H.B.M.'s Consul General at Tunis.

Report of Mr. S. Leonardi, Vice-Consul at Sfax.

1. The present consumption is at the rate of 19,000 tons a year. A small quantity is coal dust used for lime-kilns, and a very small quantity of Welsh steam coal is used for domestic purposes. The great bulk is used for raising steam, say, for bunkers, locomotives, and mills.

2. No appreciable quantity of coals has, in the last ten years, been brought from any place except Britain.

3. No coal went inland before the construction of the Sfax Gafsa Mitlaoui Railway in 1899. Sending inland is impossible by any other means.

Coal only goes up the railway for use by the Railway Phosphate Company for mining, machine shops, and locomotives.

Mitlaoui is about 100 miles inland, and is 140 miles by rail from Sfax.

4. Previous to 1903 the only important import of coals was for the Sfax Gafsa Company, and this company often had its coals sent to it. They have paid the following prices during the last three years :

For briquettes (English) per ton

frs. 28.50 frs. 23.75 frs. 30.25

delivered into wagons on quay (duty to be paid by the buyer). In the same conditions they have brought mixed large and small Cardiff steam coal frs. 23.50 and frs. 24 per ton.

The rest of the trade is conducted from coal yards in detail.

5. No British steamers have taken bunker coals at Sfax and the same is the case with the German and Scandinavian steamers. Only French and Italian boats, not mail boats, have taken coals. In 1903 they took 900 tons.

6. There has been no import of coke and there has been an increase in the import of British coals.

7. The Sfax Gafsa Railway charges per complete 10-ton wagon load—

From 1 to 25	kilometres	fr. 0·07	per ton	& per	kilometre.
„ 26 to 50	„	0·06	„	„	„
„ 51 to 100	„	0·05	„	„	„
„ 101 upwards	„	0·04	„	„	„

As there are no towns nearer than Gafsa at 203 kilometres, this rate corresponds to ¾d. per English ton per mile and a fraction less for Mitlaoui.

8. More steamers will be induced to take British bunker coals if the principal coal importing house maintains reasonable prices, and induces shipowners to make contracts, and generally to arrange for steamers taking phosphates to coal here.

Only British coal is imported even for the supply of the French torpedo- and gunboats.

9. There are no exports of coal or coke by sea from this port to any place at a distance.

10. The import duty is frs. 1.20 per ton of 1,000 kilometres ; there is no preference in favour of French coals. The increase of the consumption at Sfax will be due to increased mining or industry, and to increased shipping, and a larger proportion of the shipping coaling at Sfax, rather than at Algiers or at Gibraltar.

TUNIS.

Enclosure and extract from dispatch, dated Tunis, 3rd March, 1904, from Mr. E. J. L. Berkeley, C.B., H.B.M.'s Consul-General at Tunis.

1. The total annual consumption is 72,000 tons ; namely, domestic purposes (inclusive of quantity consumed at the gas works) about 4,000 tons ; steam purposes, 68,000 tons, largely for bunkering French Liners such as the Transatlantic Co., etc.

2. Cardiff, Swansea, Newcastle. No source of supply outside of England during the past ten years. A small quantity of coke for smelting purposes has been sent recently from the Gard (France) to Tunis.

3. Relatively small quantity penetrates by rail along a distance of 150 kilometres for road repairing machines and agricultural machines—say, 2,000 tons annually maximum.

4. With regard to question 4, I am told it is impossible to quote prices for the past ten years with any exactitude, the descriptions of coal being manifold and the mixtures great. The present price for best Cardiff colliery screened coal may be taken at 30 francs per ton loaded into railway trucks direct from the vessel's side. This price is probably the lowest that has ruled for the past ten years. At the same time, I am informed that there is not a great deal of best Cardiff, the qualities more generally imported being second and third rate descriptions and mixtures.

The present prices for coal in Tunis are :—

	Francs.
Cardiff patent fuel	30 to 32
Gas coke	40
Foundry coke	60
Forge	40

5. British ships rarely bunker here, the quantity is quite insignificant.

6. During the past ten years the importations of British coal have quite doubled, and the market is entirely supplied from British sources.

7. The railway rates chargeable are :—

Fifty kilometres to 100, five centimes per kilometre per ton.

Over 100 kilometres, four centimes per kilometre per ton.

8. With regard to Question 8, I may mention that the British coal trade in Tunisia has certainly shown a small increase year by year for the past ten years. The ports responsible for the increase are really Sfax and Tunis, but it is quite probable that Bizerta may in the future surpass both, owing to its excellent geographical position as a port of call for boats requiring bunkers.

The practicable means by which Great Britain might help to maintain, or rather increase, the British coal trade would be for British steamship owners to make Bizerta a calling port for bunkers. I have been assured that, if the railway from Ouenza Mines were constructed to Bizerta instead of to Bone, the coal trade of Bizerta would be more than quadrupled ; but this, of course, is an internal affair in the hands of the French Government and not in ours.

There is practically no other coal, or none of any importance, imported into Tunisia except British coals. Occasionally small quantities of foundry coke and forge coal come from France and patent fuel from Belgium, but these do not amount to 5 per cent. of the quantity imported.

9. There is no export, as no coal is produced in the country, unless coal supplied for bunkers be counted as exports.

10. British coals are not seriously handicapped, there being practically no competitors. Eight per cent. ad valorem of the c.i.f. price is paid to the Customs, and coal reshipped as bunkers is free of duty.

UGANDA.

ENTEBBE.

Extract from the dispatch of Lieut-Colonel J. Hayes Sadler, C.B., H.B.M.'s Commissioner and Consul-General, dated Entebbe, 17th February, 1904.

No coal of any description whatever is used in this Protectorate; wood fuel only.

ZANZIBAR.

ZANZIBAR.

Enclosure in dispatch dated Zanzibar, 18th February, 1904, from Mr. J. H. Sinclair, H.B.M.'s Consul at Zanzibar.

1. The local consumption of coal is only about 300 tons per annum. This is used wholly for manufacturing purposes. The coal imported for supplying ships, however, is about 8,000 tons British and about 10,000 tons Indian.

2. Cardiff for Welsh (no other British coal is imported), Moji for one supply in 1900, Calcutta for India.

3. There are no towns or markets for coal other than at the port of Zanzibar.

4. Welsh coal 45s. 9d. to 75s. contract prices. Free on board ex-lighters.
Indian coal, 24Rs. to 28Rs. contract prices. Free on board ex-lighters.

5. About 6,000 tons of British coal is shipped by His Majesty's Navy, and the remaining 2,000 by ships of the Messageries Maritimes Line.

6. Importations of British coal for the last five years average 3,000 tons less than the previous five years. The decline is partly due to the importation of Indian coal, but chiefly to the decrease in consumption by His Majesty's ships.
Many vessels are now bunkered here which would not do so if only Welsh were obtainable.

7. There are no railways.

8. If a first-class British line of steamers is, as reported, to be run down the East Coast of Africa, they would probably bunker British coal here, but otherwise I see no prospect of steamers which can burn Indian coal caring to pay the far higher price of Welsh.

9. There are no exports.

10. There is no Customs duty on coal; the cost is high, largely owing to want of return freights; labour also is costly.

AMERICA:

ARGENTINE REPUBLIC.

BUENOS AIRES.

Enclosure in dispatch, dated Buenos Aires, 12th August, 1904, from Mr. A. C. Ross, C.B., H.B.M.'s Consul at Buenos Aires.

1. The coal imported into the Argentine Republic in 1903 amounted to 1,070,000 tons. Of this 850,000 was landed in the Buenos Aires Consulate district.

The total import can be roughly classified as follows:—

Quality.	Tons.
Domestic	50,000
Gas	150,000
Steam	870,000

The bulk of the steam coal is used by the railway companies.

2. The following Table gives the countries from which coal has been imported during the past ten years. British coal has practically no rival in Argentina.

Year.	United Kingdom. Tons.	U.S.A. Tons.	Belgium. Tons.	Spain. Tons.	Germany. Tons.	France. Tons.	Sundries. Tons.
1903	1,070,000	—	—	—	—	—	—
1902	1,048,000	—	—	—	—	—	—
1901	925,000	4,000	20	—	—	—	—
1900	770,000	—	—	3,100	—	—	—
1899	1,083,000	4,300	1,321	—	765	—	—
1898	872,000	4,900	2,100	—	931	18	545
1897	776,000	—	—	—	—	—	—
1896	866,000	—	—	—	—	—	—
1895	844,000	4,900	200	—	—	—	—
1894	710,000	21,000	421	—	—	540	1,535

3. British coal has penetrated wherever there are railways, West to the Andes, North to Bolivia, and South to Patagonia. It has been taken to distant places solely for railway use. The factories requiring coal outside of Buenos Aires and Rosario are insignificant. North and West, good wood fuel is so abundant that it is used on locomotives. The railway companies, however, keep small stocks in hand for their work-shops and for use on locomotives in cases of emergency, or when the demands of wood-sellers become unduly exigent. Outside of the cities there is no demand at all for domestic coal, wood and dried dung being invariably used. For harvesting machinery, maize cobs and straw are burnt. Coal has been carried to such parts of the country as are accessible by steamer and lighter.

4. The highest and lowest prices of British steam coal delivered alongside a wharf in Buenos Aires are as follows:

Year.	Price per ton. Highest. s. d.	Lowest. s. d.
1897	25 –	17 11
1898	32 –	17 8
1899	26 3	19 3
1900	35 3	18 7
1901	33 10	23 11
1902	30 10	22 11
1903	27 11	21 5

The following prices were obtained by American steam coal:—

	s. d.
1901	26 3
1902	20 2

5. In 1903 about 170,000 tons of coal were shipped for bunkers.

6. The import of British coal has increased during the last ten years, chiefly owing to the increase of traffic on the railways and the erection of large freezing works.

7. The following are the rates for transport of coal quoted by some of the leading railway companies:—

Pacific Railway $\frac{3}{4}$d. per ton avoirdupois per mile, terminal charge 3s. 11½d. per ton.

Great Southern Railway Company, lots of not less than ten tons a distance of:—

Kilometres	Per ton. s. d.
20	4 6
100	7 4
350	16 3
500	18 11
1,000	27 10

The tariff is made up on a kilometric base.

The Buenos Aires Western Railway Company quotes rates to certain stations distant as under:—

Miles.	Per ton. s. d.
376	19 9½
366	19 6¾
362	19 5½
316	18 2¾

No preferential rates are given for any kind of coal.

There is no native coal used anywhere. It is reported that coal exists near Mendoza and in the far South, but it has not yet been exploited commercially.

8. The British coal trade is maintained owing (1) to the superior steam and gas producing qualities of the coal; and (2) to the low freights from the United Kingdom to the Plate.

9. There is no export of coal or coke from this district. The import of coke in the last four years is as follows:—

Year.	Tons.
1903	8,600
1902	12,000
1901	10,000
1899	6,000

10. There is no import duty on coal, but a charge of three cents. gold per ton is made for slingage.

The general import of coal is in the hands of five firms, four of which are British, the fifth French. All the principal railway and gas companies import direct the coal for their own use.

ROSARIO.

Enclosure in dispatch, dated Rosario, 3rd March, 1904, from Mr. H. M. Mallet, H.B.M.'s Consul at Rosario.

1. About 225,000 tons annually, of which about 95,000 tons are used by the railways, 125,000 tons for local requirements, and 5,000 tons sent to the provinces.

2. From the United Kingdom. The railways import principally Cardiff coal.

3. To Cordoba by rail.

4. Statistics of prices for ten years past are not obtainable, but for some time past the highest and lowest prices are said to have been 36s. and 30s. respectively.

5. Vessels seldom take coal at Rosario, and when they do only in a small quantity.

6. The import of British coal and coke is increasing as the requirements become greater.

7. Prices vary. During the year 1903 the price for discharging from hold of vessel to wagon was from 1s. to 1s. 5d. per ton.

There are no differential rates, British coal only is imported.

8. (See latter part of reply to No. 7.)

9. None.

10. Coal is practically admitted free of duty.

BRAZIL.

BAHIA.

Enclosure in dispatch, dated Bahia, 14th April, 1904, from Mr. A. F. H. Medhurst, H.B.M.'s Consul at Bahia.

1. The annual consumption of coal in the district of Bahia is approximately as follows :—

	Tons.
For steam purposes - - - -	20,000
„ manufactories - - - - -	10,000
„ gas - - - - - - -	10,000

2. The source of supply is practically Great Britain, the United States of America having furnished only some few hundred tons.

3. Coal only penetrates inland as far as the limited railway system carries it. The few sugar factories which consume coal are established forty to fifty miles from Bahia.

4. Respecting coal prices for the last ten years, prices may be said to have ranged at from 35s. to 50s. per ton for Cardiff coal. All coal vessels anchor in the bay so that no prices can be given for delivery into trucks. Quotations are usually made ex depôt or ex lighters, a quantity of the latter being always ready loaded awaiting steamers. Prices for shore coal average 2s. 6d. per ton higher than coal for bunkering.

5. Seventy-five per cent. of the coal imported is taken by foreigners, the remainder being shipped for the bunkers of British vessels.

6. A considerable diminution is noticeable in the coal imports in this district during the last ten years, Cardiff coal being chiefly affected. This is owing to steamers now usually leaving Europe with more coal in their bunkers than they did a few years ago, and to the fact that coal prices further south are lower than they are here. Further, with a view to economy local railways now consume wood, whereas three years ago they always burnt coal.

7. There is practically no coal carried by local railways, therefore no rates ; neither is there any native coal.

8. I have no suggestions to make.

9. There are no exports of coal or coke from this district other than those mentioned in Paragraph 1.

10. There is only one rate of duty charged in this port, viz. : 2s. 6d. per ton.

MANAOS.

Enclosure in dispatch, dated Para, 17th February, 1904, from Mr. W. A. Churchill, H.B.M.'s Consul at Para.

Report of Mr. R. C. Sanceau, Vice-Consul at Manáos.

1. Present consumption of coal is from 29,000 to 30,000 tons per annum—all for manufacturing or steam purposes.

2. The source of supply is entirely British.

3. British coal has been shipped per ocean-going steamers to Iquitos, in Peru about 1,300 miles farther up the Amazon than this port.

4. Prices here vary between £2 and £3 per ton of forty cubic feet.

5. Only a small quantity is shipped for the bunkers of British vessels, about 500 tons per annum.

6. The quantity of coal imported, which ten years ago was about 200 tons per annnm, has increased to about 30,000 tons, and is still increasing.

7. There are no railways in this sub-district.

8. To maintain the steadily increasing importation, the only thing required is the good quality of the coal imported.

9. There are no exports of coal from this port.

10. All coals can enter the country duty free ; but there are clearing dues, amounting to about Rs. 3000 per ton and harbour dues about 3000 per ton, making a total of about 6s. per ton.

MARANHAM.

Enclosure in dispatch, dated Para, 10th March, 1904, from Mr. W. A. Churchill, H.B.M.'s Consul at Pará.

Report of Mr. E. Compton, Vice-Consul at Maranham.

1. 22,280 tons, of which 2,500 tons for gas, and the rest for steam and manufacturing purposes.

2. Great Britain.

3. Not used in the interior.

4. The prices have varied from £2 to £3 per ton delivered in lighters. There are no railways.

5. As a rule no coal is shipped for bunkers in British vessels.

6. The imports are increasing.

7. There are no railways.

8. The demand might be increased if the cost could be reduced.

9. No.

10. Taxes on imported coals amount to 2s. 6d. per ton.

PERNAMBUCO.

Enclosure in dispatch, dated Pernambuco, 19th February, 1904, from Mr. A. L. G. Williams, H.B.M.'s Acting Consul at Pernambuco.

'The volume of imports of coal at Maceio, Parhyba, Rio Grande do Norte and Ceará is so small, and confined almost entirely to the wants of British railways, that I have not waited for reports from these Vice-Consulates.'
(*Extract from Mr. Acting Consul A. G. Williams' dispatch dated Pernambuco, 19th February, 1904.*)

1. The imports of coal for the last ten years have been as follows:—

	Tons.		Tons.
1894	69,100	1899	66,303
1895	65,590	1900	73,911
1896	74,207	1901	79,518
1897	63,128	1902	70,012
1898	63,424	1903	68,577

or an average of 69,377 tons per annum.

There is no consumption whatever for domestic purposes; fully half the supply is used for bunkers of native coasting steamers, the balance for the railways, manufacturing and gas making purposes.

2. With the exception of 4,000 tons of American coal in 1900, 2,200 tons in 1901 and 1902, and a few small shipments of Lancashire and Newcastle coal, the balance has been all imported from South Wales. Some 7,000 tons of Scotch coal has been landed from vessels that have put in here in distress, but there are no regular importations of that quality.

3. There is no demand in the interior for coal, except from cotton mills, many of which are partly worked by water, a short distance from the coast, and their consumption is limited to a few thousand tons per annum.

4. The prices for coal delivered into railway trucks would be about the same as that charged for bunker coal, as lighterage and cost of discharging are incurred in both cases, and I therefore give the prices for the last ten years for South Wales bunker coal:

	Per Ton. s. d.		Per Ton. s. d.
1894	42 –	1899	39 6
1895	36 6	1900	39 6
1896	34 6	1901	46 6
1897	36 6	1902	37 6
1898	37 –	1903	38 6

Coaling in the outer roads at Pernambuco costs 10s. per ton extra.

There have been no sales of Lancashire, Newcastle or American coal, importers getting out small supplies for their own requirements.

5. In 1903 British steamers took altogether 2,711 tons of coal for bunkers.

6. The falling off in 1894, 1895, and 1896, was probably owing to the rate of exchange having fallen below 8d. and even 7d., and for a short time below 6d. per milreis, the average for these three years being about 7¼d. per milreis, when wood then became a cheaper fuel, and in some instances, was used for locomotives and manufacturing purposes. This would affect Cardiff coal more than the cheaper kinds of Lancashire, Newcastle, or American coal. Taking the imports of the first five years 1894–1898, we get 335,449 tons, and comparing them with the last five years 1899–1903 or 358,321 tons, the average increase is about 3,500 tons; but the increase might have been much more, were it not for the bunkering prices for coasting steamers being lower in Rio de Janeiro than here.

7. The railway tariff for coal is at the rate of 43 reis (equal to about one halfpenny) per ton per kilometre. To the gas works and most of the cotton mills and manufactories, the coal is transported by water in lighters according to the distance and delay of lighters, from 3s. to 6s. per ton.

8. The coal trade here, like every other trade, is hampered by direct and indirect taxation. Coals are cheaper in Rio than Pernambuco, and far cheaper in Montevideo and St. Vincent, Cape Verde; so that British and foreign steamers only put in here for coal when, owing to some unforeseen occurrence they find themselves running dangerously short, when they take only sufficient to carry them to their destination, or to another coaling port where they can supply themselves on more advantageous terms.

If the projected port improvements, however, are carried out, and not only colliers are able to unload their cargoes on the quays or wharves, but mail steamers of twenty-six or twenty-seven feet draught, and tramp steamers, are able to come alongside to take in coal, then a very considerable increase in consumption might take place here. But so far as any increased demand for manufacturing or steam purposes goes, there is absolutely no immediate prospect. No great development of native industries in this Consular district can be looked for at present, and the extension of the existing railways, although desirable from every economic point of view, must be postponed for more prosperous times.

9. There are no exports of coal and the small amount of coke produced at the gas works is consumed by local iron foundries.

10. There is nothing in the shape of import duties or taxation to affect the competitive power of British coals, because the same duties and the same taxation fall on all kinds of imported coals, and there is no native supply. It is commonly said that coal pays no duty, but, nevertheless, the following charges are made by the Customs:

10 per cent. ad valorem,
10 per cent. additional, and a

further tax of ½ per cent, ad valorem, called a tax for statistics, or about 2s. 4d. per ton altogether. These are the direct taxes; the indirect taxes take the form arbitrary sums collected from the importer, for being an importer, on his coal yards and warehouses, lighters and tugboats, by the Federal State, and municipal authorities, and other minor impositions calculated to increase the cost of coal at this port.

PORTO ALEGRE.

Enclosure in dispatch, dated Porto Alegre, 7th April, 1904, from Mr. A. Archer, H.B.M's. Consul at Porto Alegre.

1. No statistics are to be had concerning the consumption of coal in this district. and there are no means of obtaining the information. It is not used at all for domestic purposes, and the consumption for manufacturing purposes, if any, is limited to native coal, but wood is generally used.

The chief user of English coal is the Porto Alegre and New Hamburg Railway, which in 1903 used 483 tons, all Cardiff briquettes, and about ten tons smithy coal.

2. Native coal has been supplied from a mine situated at São Jeronymo, about thirty miles from Porto Alegre. The imported coal comes from the United Kingdom, but with the exception of supplies for the above-mentioned railway and for the gas works, it merely consists of small quantities of smith's coal.

3. Only retail quantities of smithy coal are sent inland. There is railway communication as far as Pasco Fundo, upwards of 400 miles from Porto Alegre.

4. No coal is delivered into railway trucks alongside vessels in this port.

5. None.

6. Information on these points is not obtainable, but if there has been any falling off in the last ten years it would be in the imports for the above-named railway, which, owing to pressure on the part of the Government, uses a certain quantity of native coal.

7. No information. Coal in appreciable quantities is not carried by the railways here.

8. No.

9. There are exports of native coal to places in this State that is, coastwise, but not beyond, so far as I am aware. I wrote to the company owning the mine asking for information on this and other points, but no reply has been vouchsafed.

10. This market may be considered as of absolutely no importance as far as British coal is concerned, but the duties would not seem to affect its competitive power, as I am informed by the manager of the Porto Alegre and New Hamburg Railway, that the imported briquettes cost Rs. 60 $000 (about £3) per ton placed in the company's store, the smithy coal costing about Rs. 57 $000 (say 57s.); while the native coal costs about Rs. 31 $00 (31s.) under the same conditions. The latter, however, requires 2½ tons to perform the duty of one ton of Cardiff briquettes, while it involves increased labour, injures the fire boxes, tubes, and smoke boxes of locomotives, and increases the cost of repairs.

RIO DE JANEIRO.

Enclosure in dispatch, dated Rio de Janeiro, 29th March, 1904, from Mr. A. Chapman, H.B.M.'s Consul-General at Rio de Janeiro.

1. and 2. The importation of coal entered at Rio de Janeiro during the last five years have been as follows:—

	British.	American.	Totals.
1899 - -	482,903	52,971	535,874
1900 - -	386,465	46,232	432,697
1901 - -	400,836	81,504	482,340
1902 - -	497,753	19,483	517,236
1903 - -	514,062	9,097	523,159
Tons - -	2,282,019	209,287	2,491,306

It is calculated that of the British coal imported 75 per cent. is for steam purposes (for use of railways, steamers, factories, etc.); 15 per cent. is gas coal; 10 per cent. is used for domestic purposes.

The foregoing figures may be taken to represent the local consumption, as, apart from the American coal, the importation of which has almost ceased, there is no competition whatever from other coals, native or foreign, the main source of supply being the United Kingdom.

3. British coal is practically unused inland except on railways.

4. The lowest price for Cardiff steam coal was Rs. 30 $000 (say 30s.), and the highest Rs. 100 $000 (say £5). For Pocahontas (North America), used to a small extent for coking, the lowest price was also Rs. 30 $000 or 30s.

5. Of the steam coal imported it is estimated that 10 per cent. is reshipped for bunkers of British vessels.

6. There has been no falling off in the importations of British coal, but rather an increase.

7. No native coal is mined to any appreciable extent, and thus far there are no preferential rates. The Government, however, have lately shown a disposition to encourage native coal mining under preferential treatment.

8. The British coal trade in this district can best be maintained by keeping prices lower than, or at least equal to, those offered from the United States, the only country which has yet presented itself as a possible competitor, British coal being preferred to the American, prices being equal.

9. There are no exports of coal or coke from this district.

10. In 1901 the importation of American coal assumed proportions of certain importance, but since then it has fallen away. This is attributable to the labour troubles which have been dominant in the United States for the last two years, the price of American coal having risen in consequence to such an extent as to make its importation impossible, notwithstanding the export tax now levied on British coal by the Home Government.

RIO GRANDE DO SUL.

Enclosure in dispatch, dated Rio Grande do Sul, 12th April, 1904 from Mr. Percy Staniforth, H.B.M.'s Consul at Rio Grande do Sul.

1. The consumption of coal in this district is at present about 20,000 tons per annum, and is all used for manufacturing or steam purposes.

2. Chiefly the United Kingdom. On rare occasions small quantities came from the United States and Germany. Since 1902 all imported coal has been British.

3. As far as Bazé, 200 miles, by the "Southern Brazilian and Rio Grande do Sul Railway."

4. The highest price £3 10s. and the lowest £2, but it is impossible to give all the fluctuations, as the market is often violently disturbed, owing to small stock, prices constantly varying according to demand, and affected from day to day by fluctuations in exchange. During the past twelve months, owing to a steady supply and exchange, the price has varied from £2 to £2 5s. per ton, Cardiff being the only coal seriously dealt in.

5. None.

6. The quantity is steadily increasing.

7. At the present rate of exchange the railway rates equal 11s. 6d. per ton. There are no differential rates.

8. The British coal trade in this district is steadily increasing on its own merits.

9. None.

10. The important duty is ad valorem and ranges from 2s. to 2s. 6d. per ton for all imported coal.

Native coal is mined in this state, at San Geronimo, but it is of very inferior quality and little used. It cannot be considered as seriously competing with British coal, which is the only coal in real demand here.

SANTA CATHARINA.

Enclosure in dispatch, dated Rio Grande do Sul, 12th April, 1904, from Mr. Percy Staniforth, H.B.M.'s Consul at Rio Grande do Sul. Report of Mr. W. B. Chaplin, Vice-Consul at Santa Catharina.

1. The present consumption of coal is about 3,000 tons per annum.

2. 14,012 tons from Cardiff, 695½ from Germany, and 50 from the United States.

3. There is no consumption of coal in the interior of this district.

4. The British coal has been purchased at the following prices; delivered into trucks alongside vessels in each of the last five years, including all expenses, but less the 10 per cent. import duties; 1899, £1 2s. 3d., 1900, £1 14s. 7d., 1901, £1 18s. 11d., 1902, £1 16s. 8d., 1903, £1 11s. 10d. The German coal at the same price and the fifty tons from the United States 2s. less than the British price in 1901.

5. About fifty tons sold to a British steamer.

6. Yes, but this is owing to a smaller number of steamers and Brazilian men-of-war calling at this port.

8. No.

9. None.

10. No. All coals pay 10 per cent. on the official value, which is £1 0s. 0d. per ton at the present rate of exchange (12d.)

Remarks.

I have not been able to obtain the quantity of coals imported during the five years ended 1898, owing to the fact that there were no statistics prepared.

Table of imports during the five years ended 1903.

Year.	Gt. Britain.	Germany.	U. States.	Totals.
	Tons.	Tons.	Tons.	Tons.
1899.	3,464	156	Nil.	3,630
1900.	3,131	227	,,	3,358
1901.	2,838	163	50	3,056
1902.	1,904	84	Nil.	1,988
1903.	2,675	65	,,	2,740
Total -	14,012	695	50	14,772

SAÕ PAULO.

Enclosure in dispatch, dated Saõ Paulo, 28th March, 1904, from Mr. Percy C. P. Lupton, H.B.M.'s Vice-Consul at Saõ Paulo.

"On the matter of consumption here of British coal the trade is fairly good, as is also the outlook. Foreign and native coals have made no appreciable inroads in our trade." (*Extract from dispatch, dated Saõ Paulo, of the 28th March, 1904.*)

1. Present consumption of British coal in State of Saõ Paulo, Brazil, of all qualities, Cardiff steam coal, Newcastle steam and gas coal, smithy coal and foundry coke, is about 130,000 tons; none of which is used for domestic purposes, the great bulk being consumed by:

1st.—The Saõ Paulo Railway Company (English).
2nd.—The Mogyana Railway (Brazilian).
3rd.—The Sorocabana Railway (Brazilian).
4th.—The Santos Dock Company (Brazilian).
5th.—The Saõ Paulo Gas Company (English).

and the balance by the various cotton, sacking, and other factories and by breweries.

2. All coal during the last ten years has come from Great Britain, with the exception of an insignificant quantity of American coal, which was shipped here during the strike in Cardiff in 1899.

3. Coal can be readily sold at some 250 kilometres from the sea coast, being transported by a good system of railways; but beyond this distance the freight charges render it too costly to easily compete against the use of wood, which is burned in large quantities.

4. Prices of Cardiff steam coal average about 31s. delivered into railway wagons in the port of Santos, but rose as high as from 48s. to 50s. during the great strike.

5. A very insignificant quantity of Cardiff steam coal is supplied for the bunkers of British vessels; this notwithstanding the fact that Santos is the best, safest, and most navigable port on the east coast of South America.

6. The quantity of coal imported during the last five years has diminished owing to the increase in the consumption of wood; this especially in the case of the Brazilian railways running into the interior.

7. Railway rates are fairly reasonable, about 3s. 8d. per ton per fifty miles run; all qualities of coal from whatever source pay at the same rate.

8. The British coal trade can only be maintained or increased by the usual commercial methods of pushing any article of commerce.

9. There are no exports of any kind of coal from this district, coal fields being non-existent or undiscovered.

10. Charges are the same for all, so that British coals, owing to their superiority, stand a better chance than those imported from other sources.

CHILE.

COQUIMBO.

Enclosure in dispatch, dated Coquimbo, 8th April, 1904, *from Mr. G. L. Ansted, H.B.M.'s Consul at Coquimbo.*

1. About 72,000 tons, of which only some 4,000 tons are used for domestic purposes, copper smelting consuming the greater part of the remainder.

The imports of coke are included in the answer to question No. 2, but no information of the consumption could be obtained from the works concerned.

Sources of supply are:—

Year.	Great Britain	Australia.	Native.
1894.	22,900	2,100	50,700
1895.	20,600	1,700	59,200
1896.	28,000	5,700	40,700
1897.	19,000	3,400	41,500
1898.	39,000	1,300	37,500
1899.	26,400	2,000	39,800
1900.	15,000	6,200	40,900
1901.	*37,100	10,100	41,800
1902.	*25,800	8,200	39,700
1903.	16,500	13,900	?

* Included heavy imports of Navy steam coal.

N.B.—Of the coke, probably one-half of the total imported came from Germany and Belgium, and the tendency is towards an increased use of the Continental article at the expense of the British, the former being cheaper.

3. To the copper works, distant some thirty miles by rail, though in a direction to a certain degree parallel with the coast line, and not more than fifteen miles inland through a very mountainous country reaching to the shore.

All the coal and coke used inland goes from Coquimbo by rail; some coke, however, consumed at works situated 30 miles to the north, is landed at a creek and goes inland in mule-carts.

4.

Year.	Great Britain. highest ? lowest ?	Australia. h'st?	Australia. l'st?	Native. h'st?	Native. l'st?
		s. d.		s. d.	
1894.	Details not procurable,	18 10		12 9	
1895.	but prices range gener-	22 6		18 2	
1896.	ally from 2s. to 5s.	16 0		17 4	
1897.	higher for Cardiff	22 0		18 0	
1898.	(Rhondda) smelting coal	21 0		17 6	
1899.	and those paid for	25 3		18 0	
1900.	Australian Steam coal,	32 9		19 9	
1901.	which, however, is used	27 0		20 9	
1902.	here for the Smelting	25 0		21 6	
1903.	furnaces.	22 9		?	

5. Only the Navy steam coal is re-shipped.

6. Answered by No. 2 as regards coke. No change noticeable in coals save in Navy steam coal, of which the Chilian Government imported an unusually large supply in 1901 under exceptional circumstances.

7. State Railway rates for coal are: four-tenths of one cent. per quintal metrical per kilometre, or say three farthings sterling per metrical ton per kilometre. No differential rates exist.

8. Copper smelting being the principal manufacturing industry of the district, the price of copper affects coal consumption.

9. No; save for ships-of-war as shown at No. 6.

10. No import duties are levied upon coal.

The price of the imported coal, all from Great Britain and British dependencies, rules the market for the native product.

CORONEL.

Enclosure in dispatch, dated Valparaiso, 8th April, 1904, from Mr. A. L. Rowley, H.B.M.'s Acting Consul-General at Valparaiso.

Report of Mr. E. Cooper, Vice Consul at Coronel.

1, 2, & 9. All coal used for steam and domestic purposes in this district comes from the mines in Coronel itself. For the last few years close on 300,000 tons of coal have been shipped annually, same being almost exclusively for bunkering steamers; this trade has gradually increased in proportion with the development of the coast trade and consequent increase in number of steamers calling here.

3, 4, 6. British coal has not been landed here.

7. British and native coals pay the same railway rates.

8 & 10. As this is entirely a coal mining district it would be difficult to expect British coal to compete with that raised on the spot, owing to the freight from home. At present native coal is sold at about 16s. trimmed into bunkers, and even making an allowance of 20 per cent. for difference of quality, British coal would have to be sold at 19s. to compete. The Government railways also take a quantity of coal from the collieries here, some being sent to Valparaiso by steamer and the rest by rail to Concepcion. Owing to the freight from here to Valparaiso being more or less 5s. a ton a good deal of British and Australian coal is taken in Valparaiso by the railways, but in the south it is impossible to compete with the native article.

LOTA.

Enclosure in dispatch, dated Valparaiso, 8th April, 1904, from Mr. A. L. Rowley, H.B.M.'s Acting Consul-General at Valparaiso.

Report of Mr. H. H. Maguire, Vice-Consul at Lota.

1. The amount of coal produced from the mines in this district is roughly 300,000 tons, of which some 71,000 tons is shipped for bunkers' use, and 73,000 tons shipped for other Chilian ports, the rest being used for smelting copper, railways, and machinery.

2-8. No English or other coal has been imported into this district.

9. No export of coal to other countries.

10. The price (ten pesos alongside, say 16d. per peso), is too low for British coal to compete.

VALPARAISO.

Enclosure in dispatch, dated Valparaiso, 8th April, 1904, from Mr. A. L. Rowley, H.B.M.'s Acting Consul-General at Valparaiso.

1. The consumption of foreign coal in Chile between Valparaiso and Pisagua, both inclusive, has been as follows:—

1893	400,829	tons.
1894	605,035	,,
1895	654,840	,,
1896	618,973	,,
1897	533,879	,,
1898	575,303	,,
1899	661,669	,,
1900	674,746	,,
1901	890,611	,,
1902	829,608	,,
1903	809,654	,,

The following is the distribution of the above quantities:

—	Steam Coal.					Smelting Coal.		Total.
	English.			Australian.	American.	English.	Australian.	
	Hartley.	Orrell.	Other classes.	Used as Steam.	—	Various.	Used as Smelting.	Tons.
1893 - -	171,473	21,540	42,328	127,113	—	15,223	23,152	400,829
1894 - -	208,639	13,082	104,132	206,586	—	20,120	52,476	605,035
1895 - -	189,119	16,412	157,498	227,014	—	22,809	41,988	654,840
1896 - -	151,547	9,254	115,024	290,073	—	14,889	38,186	618,973
1897 - -	126,909	—	52,979	296,173	—	7,646	50,172	533,879
1898 - -	134,177	8,591	100,480	270,085	10,608	8,599	42,763	575,303
1899 - -	125,042	7,633	151,325	307,119	3,200	24,073	43,277	661,669
1900 - -	88,655	10,341	121,284	356,859	35,600	15,657	46,350	674,746
1901 - -	110,280	6,804	217,030	442,380	33,150	25,868	55,099	890,611
1902 - -	122,965	5,876	255,883	345,154	34,887	10,570	54,273	829,608
1903 - -	123,422	800	186,917	426,135	6,825	6,356	59,199	809,654

2. The above statistics will demonstrate the source from which supplies are derived. In addition to the above, approximately 600,000 tons of native coal is mined in the South of Chile; no statistics are obtainable of a reliable nature, so it is impossible to give more than round figures.

3. British coal has penetrated throughout the interior of Chile where railroads or roads exist, and in the northern provinces a good deal finds its way into the interior on mule back.

4. So far as it is possible to ascertain, the highest price obtained for British coal has been 40s. a ton for Cardiff c.i.f., Australian and other classes ruling some 5s. a ton less, and West Hartley on the same basis as Australian. The average price of Cardiff coal may be taken as 30s., West Hartley about 23s., and Australian 23s. High prices are only obtained in cases of abnormal circumstances such as existed in 1900, when the production of Chile suddenly became short of requirements owing to the flooding of the mines.

5. Both English and Australian coal are used in a limited measure for bunkering steamers, being transhipped from hulks, or vessels discharging or delivered from shore.

6. The quantity of British coal imported into Chile has by no means decreased, as figures in Table clearly show.

7. The railway rates on British coal are the same as on native and other imported coal, and are extremely low, say 4s. 6d. a ton for 100 miles on the State railways, fluctuating with the exchange.

8. It is impossible to offer any suggestions as to how the British coal trade in this country may be increased, the demand absolutely lies on the coast; when freights from England are high or the selling prices high, supplies are drawn from Australia or from the native mines to a large extent, and *vice versâ*.

9. There are no exports of native coal for foreign use, the production being taken up for bunkering purposes and for the State railways; the production of Chilian coal is considerably on the increase.

10. There are no duties on coal in Chile. American coal threatens to be an active factor in the future; being of excellent quality, it is in some cases preferred to Cardiff. The export duty in England is thought by many importers of coal to be likely to assist the Americans in establishing a market on this coast, as the extra shilling imposed has, in many instances, turned trade both to the States and Australia. In 1903, owing to the strikes in Pennsylvania, the export of American coal to this coast dropped very considerably, but this year the competition is likely to be very great. It is understood this coal can be bought at a very low price under ordinary circumstances, and only requires to have a minimum freight to compete successfully with English and Australian coals. The importation of Australian coal has greatly increased, as the figures show; the quantity of English imported has augmented on the importation of 1893 but not in proportion to Australian. The United States Government have placed an order with contractors in Valparaiso to keep a stock of 3,000 tons of Pocahontas coal for the purpose of bunkering their transports and war ships; formerly they used Cardiff coal. The Nitrate Oficinas and the Steamship Companies on this coast have obtained satisfactory results from Pocahontas coal, and prefer it to the best brands of Cardiff. It is a question simply of the United States being able to make their freight arrangements when serious competition with both English and Australian coal will take place.

COSTA RICA.

SAN JOSÉ.

Enclosure in dispatch, dated San José, 16th April, 1904, from Mr. F. N. Cox, H.B.M.'s. Consul at San José.

1. In 1903, the coal imported into Costa Rica amounted to 12,056 tons of 1,000 kilometres. It was used almost wholly on the railways; none for domestic purposes, nor for manufactures.

2. It all comes from England and Wales in the form of Crown Patent Fuel, which has been in use during the period specified.

3. Along the railway, 113 miles to the capital.

4. Highest price during ten years, 30s. per ton; lowest price 23s. per ton.

5. Practically none.

6. It has rather increased with the needs of the railways, which carry a heavier traffic each year.

7. Railway rates on coal are 6d. per ton per mile and there are no differential rates.

8. The railways are well content with the Crown Patent Fuel, but naturally will purchase in the best and cheapest market. One of the railways, the Northern, is an American concern, owned by the United Fruit Company of Boston, but it uses the British product.

9. None.

10. There is no native coal, but there is an import duty of 6s. per ton. The patent fuel is used because it is found to waste less and to be easier to handle than coal. There is no field for domestic or manufacturing use of coal, but possibly on the Pacific coast there may some day be a demand for smelting refractory ores, from the gold mines.

CUBA.

HAVANA.

Enclosure in dispatch, dated Havana, 27th February, 1904, from Mr. Lionel Carden, H.B.M.'s. Consul-General at Havana.

"These answers cover all the ports in the Island." *(Extract from Mr. Consul Lionel Carden's dispatch, dated Havana, 27th February, 1904.)*

1. 486,955 tons of coal were imported into various ports of Cuba during the year 1903. Of this amount 414,433 tons were imported from the United States and 72,444 tons from the United Kingdom. Practically no coal is employed in Cuba for domestic purposes, the fuel principally used being wood or charcoal. The various railways, with a total length of approximately 1,300 miles, consume about 120,000 tons. On some sugar plantations, especially those near the coast, coal is used for traction purposes on the light railways belonging to the properties; but for the manufacture of sugar the principal fuel employed is bagasse or refuse cane. The chief part of the coal imported into Cuba is used for coaling ships.

2. The United States and the United Kingdom supply all the coal consumed in Cuba.

No data of the importation of coal are obtainable for years prior to 1900. During the past four years the imports have been as follows, viz. :—

British Coal.	Tons.	American Coal.	Tons.
1900	Nil.	1900 (approximately)	400,000
1901	1,200	1901	364,986
1902	7,498	1902	387,129
1903	72,444	1903	414,438

3. The island is so narrow that the distances from the various seaports to the agricultural centres scarcely affect the question of consumption. There has been little change in the facilities for transportation during the past ten years, except for the construction of a railway from Santa Clara, the centre of the island, to Santiago at the eastern end, which passes through a very thinly populated district. The chief sugar and tobacco producing zones are fairly well supplied with railways.

4. During the last ten years British (Welsh) coal has ranged in price from 20s. to 25s. per ton, but separate data are not obtainable in regard to price for each of the years covered by this period.

American bituminous coal has ranged during the same years from $2 to $5 United States currency, the present price being $3.

5. Practically no British vessels except warships take British coal in Cuba. The amount is small and very variable.

6. British coal used to be imported into Cuba in considerable quantities prior to the year 1898, when, owing to the coal strike in England and the consequent increase in prices, American coal took its place. The trade is now reviving, the year 1903 showing a considerable advance over the previous three years in the amount of British coal imported.

7. The railway rates for coal in Cuba are as follows, viz. :—

From 15 to 30 miles, a maximum of 3·33 cents per ton per mile.

From 30 to 50 miles, a maximum of 2·22 cents per ton per mile.

There are no discriminating rates for British as compared with other imported coal.

8. Though the quantity of British coal imported during the last few years shows a steady increase over 1899, a further development of the trade is entirely a matter of price. At present American bituminous coal can be placed in Havana at a much lower price than English.

9. No coal or coke is exported from Cuba.

10. There is no import duty on coal in Cuba.

CURAÇOA *see* NETHERLANDS.

DUTCH GUIANA (Surinam) *see* NETHERLANDS.

ECUADOR.

GUAYAQUIL.

Enclosure in dispatch, dated Guayaquil, 16th March, 1904, from Mr. Alfred Cartwright, H.B.M.'s. Consul at Guayaquil.

1. About 20,000 tons to 25,000 tons per year, namely :—

	Tons.
Government steamer - - - - -	1,000
Guayaquil and Quito Railroad Co.- -	12,000
Guayaquil Gas Co. - - - - -	8,000

None for domestic or manufacturing purposes.

2. Chiefly Australia. Small shipments have occasionally been received from England.

3. Not beyond Guayaquil, except in the railway trains for service in driving them.

4. Impossible to state as no sales have been made. Cost has varied on board importing vessels from 28s. to 40s. per ton; landing charges and labourage about 12s per ton.

5. None.

6. Increased through the recent establishment of the railway.

7. None conveyed.

8. The trade cannot be increased, as the total supply required is drawn from British sources.

9. None.

10. Nothing to report.

QUITO.

Extract from dispatch, dated Quito, 9th March, 1904, from Mr. L. Soderström, H.B.M.'s. Consul at Quito.

No coal is consumed in this district and coal is practically unknown. The Guayaquil and Quito Railway Company are at present developing a coal mine near the village of Columbe, in the Province of Chimborazo. but so far the result has been disappointing.

GUATEMALA.

GUATEMALA.

Enclosure in dispatch, dated Guatemala, 30th March, 1904, from Mr. H. A. R. Hervey, H.B.M's. Consul at Guatemala.

General Remarks referring to the whole Republic.

Coal is practically only used by the railway companies, and in extremely limited quantities, wood being principally employed as fuel. For domestic purposes wood charcoal is used. On the coffee and sugar estates, wood and the refuse from the coffee beans and the cane are exclusively employed.

There are no coal mines in Guatemala.

Coal is entered in the Tariff as free of duty. There are no differential duties with foreign countries other than the Central American Republics, which are not coal-producing.

At present there would appear to be no means of increasing imports of British coal, owing to the cheapness of other fuels. With reference to Mr. Vice-Consul Michovsky's report, a contract has been signed for finishing the construction of the Northern Railway, connecting Guatemala and Puerto Barrios; so that the imports of coal on the Atlantic coast are likely to increase in the near future.

LIVINGSTON.

Enclosure in dispatch, dated Guatemala, 30th March, 1904, from Mr. H. A. R. Hervey, H.B.M.'s Consul at Guatemala.

Extract from report of Mr. J. Mishovsky, Vice-Consul at Livingston. .

1. Present annual consumption about 300 tons, used entirely for steamship purposes.

2. From Liverpool by means of sailing vessels.

3. About 125 miles ; transportation by steamboat and railroad.

4. The price obtained for British coal alongside vessels at these ports has been from 25s. to 27s. sterling per ton, and Alabama and Philadelphia coal has been sold during the same period, and under the same conditions, from $7 to $8 a ton = 29s. to 33s.

5. All British coal imported here has been consumed locally.

6. The importation of British coal has fallen off some 75 per cent. in the last seven years, owing to the suspension of construction works on the Northern Railway, both British and American coal being thereby affected.

7. There are no freight rates established on coal, as all imports are for account of the railway and the Cia-de-Agencias' S.S. Transport Company.

8. British coal can compete, as regards rates of freight and price, against American coal ; the only hope of recovering the former consumption and an increase would depend on the commencement of construction works on the Guatemala Northern Railway and the Vera Paz Railway.

9. There are no exports whatever, and there are no indications that there will be any in the near future, as all veins of coal found so far have proved either very young or of insignificant quantities.

10. The import duties are very reasonable, and are applied to all coal alike.

QUEZALTENANGO.

Extract from dispatch, dated Quezaltenango, 17th March, 1904, from Mr. H. Fleischmann, H.B.M.'s Consul at Quezaltenango.

There is no coal imported into this Republic by the Ports of Champerico and Ocós in my Consular District.

SAN JOSÉ.

Enclosure in dispatch, dated Guatemala, 30th March, 1904, from Mr. H. A. R. Hervey, H.B.M.'s Consul at Guatemala.

Report of Mr. Savage, Acting Vice-Consul at San José.

1. The present consumption of coal per annum is about 4,500 tons, used principally by two railroad companies, for steam purposes.

About 400 tons forge coal are also imported annually for general use.

2. The supply during the past ten years has been from mines on the Pacific coast of the United States of America.

3. British coal is almost unknown here in this market owing to the distance, and rates of freight.

4. No prices for British coal can be quoted. American coal, viâ San Francisco, placed on railway trucks at this port, $13·50 United States Currency = say, 35s. 8d.

5. Nil.

6. Practically none imported. British coke might find a good market in San José, as by many users of coal it is preferred to other kinds.

7. Railway rate per ton to the capital about 20s. There are no differential rates.

8. I cannot make any suggestions for introducing trade in British coal into his district owing to the reasons given above.

9. There are no exports of coal or coke, and there are no coal mines in the country.

10. Most of the coal and coke imported being for railway use comes in free of duty.

HAYTI.

PORT-AU-PRINCE.

Enclosure in dispatch, dated Port-au-Prince, 5th February, 1904, from Mr. A. G. Vansittart, H.B.M.'s Consul-General at Port-au-Prince.

1. The present consumption of coal at Hayti (at a rough calculation) is about 250 tons per month, or 3,000 tons per annum.
Mineral coal is not used in this country for domestic purposes, but wood coal.

2. All the coal imported here comes from Cardiff.

3. The coal imported is landed at Port-au-Prince; a small proportion of this is used by the only railway here (light railway), which extends about twenty-eight miles into the country, to the western end of Lake Assuée. Wood is principally used.

4. Fifteen shillings per ton, free on board, at Cardiff; expenses for lighterage and labour from ship to shore would bring this up to about forty shillings per ton.

5. Ships of war requiring coal are in the habit of going to Jamaica or Havana for that purpose.

6. *Vide* Answer 2.

7. *Vide* Answer 3.

8. The Government of Hayti is in the habit of importing a cargo annually for the use of its gunboats, reduced at present to one.
Monsieur Rivière, who carries on an irregular service is another importer to the extent of about 200 to 250 tons per month. He is in the habit of receiving cargoes about twice a year. The Tramway Company imported 359 tons in July of last year, 1903, per a British schooner, but they have not since ordered any more.

9. I am informed that there are several coal mines on the island, but they never appear to have been worked, for want of capital.
At Aux Cayes, a British firm own some land with coal on it, and a sample has been sent by the firm to Germany to be tested; the result of this test is now being awaited.

10. As before stated, the quantity of coal used in this place is extremely small, and with the exception of the 359 tons received by the Tramway Company in July last year from New York, the rest comes from Cardiff.

SANTO DOMINGO.

Enclosure in dispatch, dated Port-au-Prince 15th March, 1904, from Mr. A. G. Vansittart, H.B.M.'s Consul-General at Port-au-Prince.

Report of Mr. H. H. Gosling, Vice Consul at Santo Domingo.

1. The coal consumption of this district is about 2,500 tons per annum. This amount of coal is imported annually by twelve sugar estates, a Scotch railroad, an electric light plant, and by the Dominican Government, for the use of two small gunboats.

2. Curacao, the United States and Great Britain.

3. All coal is consumed on the coast. There is only one line of railroad to the interior, that from Sanchez to La Vega; it is about forty miles long.

4. Only one cargo of coal direct from Great Britain has been delivered here since 1898, in 1903 during the coal strike in the United States. No statistics are available for the five years preceding 1898. The price of this coal, which was anthracite, was $11.50 per ton.

5. None.

6. *Vide* 4.

7. *Vide* 3.

The consumption of coal in this district is very unimportant and is likely to continue so, owing to the lack of manufactures. British coal cannot compete with American, excepting under unusual circumstances, owing to the freight on British coal being so much greater.

9. No coal is exported from this district.

10. There are no duties or impositions affecting the competitive power of British coal other than the rate of freight.

HONDURAS.

AMAPALA.

Extract from dispatch, dated Amapala, 8th March, 1904, from Mr. Robert Motz, H.B.M.'s Consul at Amapala.

There is no consumption of coal or coke in the district, nor are there any exports or imports.

PUERTO CORTES.

Enclosure in dispatch, dated Puerto Cortes, 15th February, 1904, from Mr. W. J. Bain, H.B.M.'s Acting Consul at Puerto Cortes.

1. About 300 tons, all for steam purposes and imported in small quantities in sacks.
2. United States (New Orleans and Mobile).
3. No coal shipped to interior.
4. No British coal imported.
5. None.
6. None.
7. None.
8. None.
9. The coal imported is for use of a small vessel used by the Honduras Government. There are, so far, very few manufactories in the interior and only wood fuel is used.

TEGUCIGALPA.

Extract from dispatch, dated Tegucigalpa, 20th March, 1904, from Mr. Colin W. Campbell, H.B.M.'s Consul at Tegucigalpa.

No coal is consumed in Honduras, such few engines as there are being run with wood fuel.

MARTINIQUE, *see* FRANCE.

MEXICO.

COATZACOALCOS.

Extract from an Enclosure in dispatch, dated Vera Cruz, 8th June, 1904, from Mr. Frederick P. Leay, H.B.M.'s Consul at Vera Cruz.

Report of Mr. Thomas Gemmill, Vice-Consul at Coatzacoalcos.

1. About 14,000 tons per annum. All used for steam purposes.

2. No coal of any consequence was imported before 1901.
In 1901, 7,000 tons, half American, half Welsh.
In 1902, 11,000 tons, three-fourths American, one-fourth Welsh.
In 1903, 17,000 tons, two-thirds Welsh, one-third American.

3. As far as the Pacific Ocean by means of the National Tehuantepec railway.

4. Reliable information not obtainable. British coal about 27s. per ton, there being little difference in the price of American coal.

5. About one-third used by British dredgers engaged in harbour improvements.

6. It has steadily increased since 1901, when coal importations commenced, but is likely to fall off on account of the railway commencing to use oil fuel for locomotives.

7. No coal carried for parties not connected with railway.

8. No.

9. None.

10. British coal should hold its own against American, the whole of the coal consumed being used by the railway and port works, which are controlled by a British firm, and the present rates from the United Kingdom compare favourably with those from the United States.

MEXICO CITY.

Enclosure in dispatch, dated Mexico City, 20th August, 1904, from Mr. L. J. Jerome, H.B.M.'s Consul at Mexico City.

1. Merchants estimate the total average consumption in this Republic at 800,000 tons, practically all of which is used for manufacturing, *i.e.* steam purposes.

2. United States, England and Australia.

3. English coal is only used by railways having terminals at Vera Cruz and Tampico.

4. No data available.

5. Ditto.

6. Falling off in importation of British coals on Atlantic coast due to prices. On the Pacific coast I do not think it has been much affected.

7. From Atlantic ports to Mexico City about 16s. per car load of twenty-five tons.

8. English colliery owners have had representatives here looking over the market, and I believe the conclusion which these gentlemen came to was that, owing to high freight rates, demurrage, and uncertainty in the demand, it was not worth their while to make any special sacrifices to recover the Mexican Coal Market.

9. Very small quantities over the land frontier from Coahuila into Texas.

10. Coal and coke are duty free; British coals have the same privileges as coals from other countries.

Hereto annexed are some figures furnished by a local merchant dealing in English and American coals.

IMPORTS OF COAL INTO MEXICO DURING THE FISCAL YEAR 1897–8.

To.	Kilos.
Acapulco	25,077,351
Boquilla	63,090
Ciudad Juarez	25,484,355
Coatzacoalcos	2,778,037
Guaymas	1,196,340
Isla del Carmen	7,672,549
Lamorita	3,906
La Paz	2,033
Laredo	93,468,818
Manzanillo	1,100
Mazatlan	776,797
Nogales	539,877
Progreso	1,795,095
San Blas	8,541
Santa Rosalia	13,847,005
Sasabe	27,285
Tampico	126,198,988
Tijima	3,906
Todos Santos	220,178
Túxpan	20,000
Vera Cruz	90,481,067
Total	389,666,318

COUNTRIES FROM WHICH COAL WAS IMPORTED INTO MEXICO DURING THE FISCAL YEAR, 1897–8.

From	Kilos.
Germany	2,737,500
Australia	17,727,968
Belgium	7,970,335
Spain	102,465
United States	265,316,234
England	95,361,816
France	450,000
Total	389,666,318

IMPORTS OF COAL INTO MEXICO IN 1901.

From.	Kilos.
Australia	10,783,160
Belgium	118
Canada	459,857
Columbia	1,646,356
Chile	300,000
United States	653,770,091
France	226
England	88,555,990
Total	755,515,798

IMPORTS OF COAL INTO MEXICO FOR 1902.

From	Kilos.
Germany	369,664
Australia	21,587.911
Belgium	5,149
United States	622,661,403
France	896
England	99,602,632
Total	744,227,655

IMPORTS OF COKE INTO MEXICO DURING THE FISCAL YEAR 1897–1898.

To	Kilos
Altata	1,424
Boquillas	168,526
Ciudad Juarez	81,226
Porfirio Diaz	2,355,706
Guaymas	4,080
Laredo	11,466,463
Mazatlan	359,276
Nogales	3,131
Progreso	55,396
Santa Rosalia	22,930,017
Tampico	103,960,246
Todos Santos	10,169
Vera Cruz	537,568
Total	141,933,222

From	Kilos
Germany	7,716,816
Austria	4,524
Belgium	3,531,965
United States	121,549,428
England	9,130,489
Total	141,933,222

COKE—1901.

From	Kilos
Germany	33,699,567
Austria	4,881
United States	182,028,481
France	2,204
England	26,442,822
Total	242,177,955

IMPORTS OF COKE INTO MEXICO FOR 1902.

From	Kilos
Germany	98,268,828
Austria	1,741
United States	172,099,465
France	3,336
England	11,759,436
Switzerland	4,049
Total	282,136,855

COAL AND COKE IMPORTS AT TAMPICO—1903.

Mr. Majil, the United States Consul at Tampico, writes as follows:—

The coal and coke imported into Tampico during the fiscal year ended 30th June, 1903, was as follows:—

Coal.	Tons.
American	280,906
English	31,620
Total	312,526
Coke.	
German	142,494
American	29,860
English	5,216
Total	177,570

The importation of German coke and English coal and coke will not last. Purchases in these markets by local buyers were made necessary by the very unsettled condition of American coal-mining interests during the past year. The greater part of the American coal came from

Pensacola under contract for the Central Mexican Railway Company, and was furnished by the Louisville-Nashville Railway, which has excellent facilities for loading coal into vessels in Pensacola. The German coke above listed came from Westphalia, Germany, and was shipped from the ports of Amsterdam, Rotterdam and Antwerp.

I have been informed that in the smelters the results from German coke are not as satisfactory as from the American.

A new dock for the discharge of coal and coke is under construction at this port by the Mexican Central Railway. It is to be provided with modern machinery for quick despatch of coal cargoes.

This improvement has been made necessary by the increase of the coal trade at this port, and it is rumoured that still another coal unloading dock will be constructed by private parties who are local representatives of the smelters.

PROGRESO.

Enclosure in dispatch, dated Vera Cruz, 8th June, 1904, from Mr. Frederick P. Leay, H.B.M.'s Consul at Vera Cruz.

Report of Mr. Arturo Peirce, Acting Vice-Consul at Progreso.

1. Present consumption of coal of all kinds is about 15,000 tons, of which about two-thirds are used for manufacturing and steam purposes.

2. There are no statistics available for the past ten years, but in my opinion the total imports have been gradually increasing to the amount imported in 1903, say 15,000 tons.

3. British coal has only been used on the railroads of late years, to a distance of about forty to fifty miles from Progreso.

4. Prices have ranged from £1 10s. to £2 per ton, during period named, the differences of price in local money being very varied in view of exchange; other coals, that is, American, being a trifle less.

5. Very little, if any, coal is reshipped here, save that stored at one period for the vessels of the Mexican Government. At present there is very little stored at Progreso.

6. More American coal has been imported of late, as freight is cheaper, and also it can be imported more frequently and in smaller quantities.

7. The railroad rate on coal is the same for all kinds say, $2.88, Mexican, per ton of 1,000 kilogrammes.

8. If a coal firm (British) sent an agent here, and could assure regular shipments and at stated times, an improvement might be made in this business.

9. No.

10. All charges of all kinds are the same for British as for any other coal or coke.

TAMPICO.

Enclosure in dispatch, dated Mexico City, 20th August, 1904, from Mr. L. J. Jerome, H.B.M.'s Consul at Mexico City.

Report of Mr. G. W. E. Griffith, Vice-Consul at Tampico.

1. Of the 236,242 tons of coal, and 161,438 tons of coke imported into Mexico through Tampico during the year 1903, none was used for domestic purposes in this district. About 7,000 tons of coal are used here annually for manufacturing purposes, and the greater part of the balance imported was used in the locomotives of the Mexican Central Railway.

The coke is imported for the smelters at Monterey, San Luis Potosi, Aguas Calientes and Torréon, with the exception of a small amount, which is used at the mines.

2. The sources of supply have been for the last ten years as follows:—

Year.	Coal.	Coke.	Patent Fuel.
1894	United States Canada	United States	S. Wales
1895	United States	United States	S. Wales
1896	United States S. Wales	United States S. Wales Germany	S. Wales
1897	United States Great Britain	United States	S. Wales
1898	United States Great Britain	United States	—
1899	United States	United States	—
1900	United States	United States England	—
1901	United States	United States	—
1902	United States Scotland	United States Germany England	—
1903	United States England	United States Germany Great Britain	—

3. British coal has penetrated to all parts of Mexico, transportation being by rail.

4. It is not possible to give the prices for which British coal was sold during the last ten years at this port, as all coal is imported under contract and the prices are not disclosed. The same reasons apply to other coals.

5. No British coal in this district is afterwards shipped for the bunkers of British vessels.

6. Patent fuel, which was used on the Mexican Central Railway, was not imported after 1897. Imports of British coal and coke have been irregular, an increase taking place when strikes occur in the United States, as in 1903, when the amount of coal imported reached 25,857 tons, and coke 5,216, as against 210,385 tons of coal from the United States, and 62,169 tons coke; and 94,053 tons of coke from Westphalia shipped through the ports of Rotterdam, Antwerp and Emden.

7. Coal transportation from Tampico to Mexico City (785 miles) cost $8.50—equivalent, at the present rate of exchange of 22d. per dollar, to 15s. 7d. per truck, which carries about 25 tons. The same rate is charged for coke per truck carrying about 19 tons. The freight rate to intermediate stations is more or less *pro ratâ*.

There are no differential railway rates for British coal. All coal pays the same rate.

8. The consumption of coal in this district must remain small for some time to come; but the imports of coal and coke can be increased by laying them down here at prices which can compete with those of the United States and Germany.

The use of coal and coke is increasing every day for manufacturing and other purposes; and, as the forests in the vicinity of the mines are being depleted, coal will be in greater demand.

9. There are no exports of coal or coke from this district.

10. There are no import duties on British or other coal, nor are there any impositions whatever to affect the competitive power of British coals.

VERA CRUZ.

Extract from dispatch, dated Vera Cruz, 8th June, 1904, from Mr. Frederick P. Leay, H.B.M.'s Consul at Vera Cruz.

1. The present consumption of coal per annum in the Vera Cruz Consular District is about 130,000 tons, almost entirely used for steam purposes.

2. The sources of supply in each year during the period from 1893 to 1901 may be said to have been Great Britain and the United States equally, but no figures are available, nor were any records kept of this by my predecessor. Since I took charge of this Consulate, however, I have followed the matter with some care, and may say that in 1902 the coal imported through Vera Cruz, for use throughout this district and other parts of the Republic, from Great Britain, including patent fuel and coke, amounted to 140,000 tons, against 125,000 tons from the United States, while in 1903 we figure for 168,000 tons against America's 136,000 tons.

3. British coal has penetrated during the last ten years throughout the Republic of Mexico, and rather more than half is consumed outside this Consular District. The facilities for transportation during the same period have been good.

4. The price of British coal (and I regret I cannot obtain such explicit information as is required of me) has varied, during the period from 1893 to 1901, from 18s. 6d. to 27s. 6d., delivered into railway trucks alongside vessels, and American coal from $4.05, United States gold, to $5.25 United States gold.

The British coal was chiefly Rhymney and Blackvein for lump and the Crown brand of patent fuel. The American, West Virginia, Pocahontas, Tom's Creek, and Eureka. Now a coal called the New River is largely imported.

5. None of the British coal imported is afterwards shipped for the bunkers of British vessels.

6. The quantity of British coals imported into my district has increased from year to year. Recently the Teziutlán Copper Company have imported three full ship-loads of coke from Great Britain for use in their smelters, and, later, one cargo from the United State as an experiment. Prior to this time the importations of British coke were insignificant.

7. The railway rate chargeable on British coal between this and Mexico City and other places is 1½ cents., Mexican currency, per ton, per kilometre. There are no differential rates for British coal as compared with native or other imported coals.

8. The British coal trade in this district might be increased by sending out agents with full powers to close large or small contracts including cost and freight; by advertising, as the Americans do; and by appointing permanent local agents, Englishmen if possible.

9. There are no exports hence of coal or coke.

10. There are no import duties or other impositions. The dock dues on all coal, coke, and patent fuel are 50 cents., Mexican currency, per ton, this amount being paid by the importer.

Little or no coal enters Mexico through the ports of Campeche, Frontera, or Túxpan.

NICARAGUA.

CORINTO.

Enclosure in dispatch, dated Managua, 20th April, 1904, from Mr. C. E. Nicol, H.B.M.'s Consul at Managua.

Replies of Mr. Henry Palazio, British Consular Agent at the Port of Corinto.

1. Consumption of coal varies from 200 to 1,000 tons per annum. Domestic purposes take about 30 to 50 tons.

2. The source of supply has been in the last ten years as follows:—

1894–5	400 Tons	Cardiff
1895–6	200 ,,	Wales
1896–7	400 ,,	,,
1898–9	600 ,,	,,
1901–2	1,000 ,,	New South Wales, Australia
1902–3	1,200 ,,	,,

4. Highest prices obtained for British coals, £4 5s.; lowest £3 5s.; other coals (Newcastle, N.S.W.) from £3 to £4.

5. No British vessels have coaled at Corinto.

6. British coal has fallen off, on account of facilities in price and freight to import Australian coals.

GREYTOWN.

Extract from dispatch, dated Greytown, 20th February, 1904, from Mr. H. F. Bingham, H.B.M.'s Consul at Greytown.

The amount of coal consumed in this district is very insignificant, it not being used either for domestic or manufacturing purposes, and the steamers running on the San Juan River burn wood. Coal is only used by three or four small launches running on the Bluefield's River and by a fifty ton tugboat that discharges the Ocean steamers in the Greytown roadstead.

The coal is purchased directly from the bunkers of the Ocean steamers, that used in Bluefields coming from New Orleans, and in Greytown from New York, United States of America; none comes from England, as no vessels from Europe touch at any port within this Consular district.

The price asked is about fifteen to twenty dollars United States currency, per ton of 2,000 pounds, and the coal is discharged from the steamers' bunkers in sacks.

It is not possible to give the exact amount of coal thus used, as the launches receive the coal direct from the steamers as they require it, and no record is kept of the amounts.

No coal is exported from Nicaragua, and no coal beds are known to exist in this district.

MANAGUA.

Enclosure in dispatch, dated Managua, 9th April, 1904, from Mr. C. E. Nicol, H.B.M.'s Consul at Managua.

1. There is practically no coal used. Messrs. E. Palazio and Company, in Corinto, keep a small stock for bunker purposes.

3. Coal is not sent into the interior in commercial quantities.

7. The railway rates are six cents. paper (say ·09 cents. gold) per metric ton per kilometre. There are no differential rates.

8, 9, 10. There is no coal produced and practically none consumed.

PANAMA.

COLON.

Enclosure in dispatch, dated Panama, 14th March, 1904, from Mr. C. Mallet, C.M.G., H.B.M.'s Consul at Panama.

Report of Mr. E. F. Hudson, Vice-Consul at Colon.

1. 7,550 tons; about 50 tons of which are used for domestic purposes, and 7,500 tons for steam purposes.

2. Panama Railroad Company have imported Pocahontas coal from Norfolk, Virginia. During the years 1896 to 1901, inclusive, the New Panama Canal Company imported Welsh coal exclusively, from Cardiff; since then, owing to the decrease in the amount of work done, the company have ceased to import coal for themselves, and have obtained what little they have required from the Panama Railroad Company, who are only importers here at the present time.

3. Transported thirty-six miles by the Panama railroad company to Culebra, Isthmus of Panama, where the most extensive operations on the canal have been carried on.

4. Highest price paid by the Panama Railroad Company for Pocahontas coal during the last ten years is $5.00 United States gold. Lowest price during the same period is $4.25 United States gold.

Prices paid by the Canal Company for Welsh coal cannot be ascertained here.

5. No.

6. In each of the years 1896 and 1897 the Canal Company imported about 15,000 tons of Welsh coal. Since then the importations have diminished year by year as less work on the canal has been carried on, and in 1902 they ceased altogether, the Canal Company now purchasing from the Panama Railroad Company.

7. Railway rate on coal across the Isthmus of Panama, a distance of forty-seven miles, is $4.00 United States gold per ton of 2,240 lbs.

8. When the Canal Company as a French concern has disappeared and the work is undertaken by the Americans, it is to be expected that supplies of every description required for the actual construction of the canal will be drawn almost exclusively from the United States, and doubtless American coal will have the preference over other coals. It is not unreasonable to suppose, however, that, in view of the large quantities that will be required during construction, orders might be placed in the United Kingdom, if low enough rates for British coal could be obtained.

9. No.

10. No duties are imposed upon coal imported for the use of either the Panama Railroad Company or the Panama Canal Company.

PANAMA.

Enclosure in dispatch, dated Panama, 14th March, 1904, from Mr. C. Mallet, C.M.G., H.B.M.'s Consul at Panama.

1. The annual consumption is from 25,000 to 30,000 tons, entirely by steamers, no coal for domestic or manufacturing purposes being used in Panama.

2. Chilian, and more recently Australian, from Newcastle, New South Wales.

3. No coal is forwarded to the interior of the country, from Panama.

4. Coal is not delivered into railway trucks alongside vessels, for the reason stated in No. 3. Australian coal can be placed alongside steamers at from 63s. to 70s. per ton, and American coal (Pocahontas) at from $10.00, to $12.50, say £2 1s. 0d. to £2 11s. 3d. per ton. The latter is sold by the Panama Railway Company and brought over from Colon.

5. No importations.

6. Small quantities of Welsh coal were imported up to the year 1901, by the Pacific Steam Navigation Company, solely for the supply of H. M. warships visiting the port; but the demand was so small and irregular that the practice has been discontinued. This coal was sold at from £4 to £5 per ton, delivered alongside.

7. The charge of the Panama Railway Company for the transportation of coal, under special agreement with the steamship companies, is as follows:

From Colon into lighters at Panama wharves, including all charges for loading, etc., at Colon, $4.00, say 16s. 5d. per ton.

From Colon to alongside steamers in Panama Bay, $5.00, say 20s. 6d. per ton.

8. Only by reducing prices and freights to compete with Australia, now the principal source of supply on the Pacific side of the Isthmus.

9. No.

10. There is absolutely no outlet for coal in Panama, with the exception of that required by the Steamship Companies, and were this demand to cease, it is certain that not a single cargo would enter the port in the course of the year. The fuel employed for domestic purposes is exclusively wood charcoal, for which the cooking ranges are specially adapted, and in which coal cannot be used. Fires for heating purposes are never required, and there are no factories using coal in the town or vicinity The foregoing applies to the conditions prevailing here up till now; that great changes are impending, in connection with the renewal of work on the canal, is of course certain, but it is as yet too early to form an opinion as to the extent to which the general trade of the port, and incidentally the coal trade, will be likely to be effected under the new *régime.*

Note.—"From the replies from the ports of Panama and Colon it will be seen that the Steamship Companies trading on the Pacific coast, and the Panama Railroad Companies, are practically the only consumers of coal in this Republic.

"No coal is imported at the outlying Colombian ports included within this Consular district." (*Extract from dispatch of Mr. Consul C. Mallet, C.M.G., dated Panama, 14th March,* 1904.)

PARAGUAY.

ASUNCION

Extract from dispatch, dated Asuncion, 23rd February, 1904, *from Mr. Cecil Gosling, H.B.M.'s Consul at Asuncion.*

No coal is introduced into, or exported from, this Republic.

PERU.

CALLAO.

Enclosure in dispatch, dated Callao, 2nd April, 1904, *from Mr. Alfred St. John, C.M.G., H.B.M.'s Consul-General at Callao.*

1. The total importation of coal into Peru in 1903 was 73,428 tons, the bulk of which was used for steam purposes. The balance was used for domestic and manufacturing purposes.

2. The chief sources of supply are from the United Kingdom and Australia. The quantity imported in 1903 from the United Kingdom was 54,484 tons, and from Australia 5,716 tons. The balance came from Germany and the United States.

3. With the exception of the coals used by the railway companies, British coals are chiefly consumed on the coast. About 30,000 tons of coal are used yearly in Lima, Callao and neighbouring places.

4. The highest and lowest prices obtained for British coal delivered into railway trucks alongside vessels at Callao in each of the last ten years were as follows:—

Year.	Cardiff.		West Hartley.		Westminster Brymbo.		Australian.	
	H.	L.	H.	L.	H.	L.	H.	L.
	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.	s. d.
1894	68 0	50 0	60 0	48 0	60 0	48 0	38 0	26 6
1895	68 0	56 0					38 0	30 0
1896	62 6	50 0	60 0	48 0	60 0	48 0	38 0	34 0
1897	56 0	50 0	56 0	48 0	56 0	48 0	39 6	32 0
1898	62 6	50 0					39 6	32 0
1899	59 0	50 0	56 0	45 0	56 0	45 0	39 6	32 0
1900	62 6	45 0					38 0	32 0
1901	65 0	45 0	50 0	42 6	50 0	42 6	47 6	32 0
1902	52 6	45 0					35 0	32 0
1903	50 0	44 8	48 0	42 6	48 0	42 6	40 0	22 0

German steam coal is about 3s. cheaper, as a rule, but being of inferior quality there is little demand for it. German coke is from 1s. to 2s. 6d. dearer than English coke, but the former is preferred, being, it is said, of superior quality. The price of "Elk Garden" an American coal, which is imported in small quantities, has of late years been as follows: highest 50s., lowest from 35s. to 33s. 6d. per ton.

5. The quantity of British coal imported into Peru and afterwards shipped for the bunkers of British vessels is about 20,000 tons a year.

6. The quantity of British coal imported yearly into this country has not fallen off; on the contrary, it has increased slightly. However, the reason why there is not a larger demand for coal is that petroleum oil obtained from the Peruvian fields north of Paita is used for fuel. About 25,000 tons of oil were received at Callao during 1903.

7. There are no differential railway rates chargeable on British coal imported into Peru. The railway rates on coal average from 3d. to 4d. per ton per mile.

8. There is no probability of a large increase in the demand for coal unless the supply of oil should fail.

9. Coal and coke are not exported from Peru.

10. Coal is free of duty. There are no impositions of any kind affecting the competitive power of British coals.

IQUITOS.

Enclosure in dispatch, dated Iquitos, 8th March, 1904, from Mr. Arthur Cazes, H.B.M.'s Vice-Consul at Iquitos.

1. For domestic purposes, nil, and for use on steam launches only about 100 tons yearly.

2. The small quantity consumed here has always been procured from direct ocean boats of the Red Cross Iquitos S.S. Co., who supply from their bunkers lots of five or ten tons at a time to owners of river launches.

3. Not at all.

4. Only English coal has been sold here, at prices varying from £4 to £4 10s. per ton, delivered from ship's side.

5. No.

6. It has not done so.

7. There are none.

8. Could coal be placed here at a moderate price it would, no doubt, be extensively used instead of wood fuel, but at present freights are prohibitive.

9. No. Coal does exist, but it is not yet suitable for use and is not worked at all.

10. The import duties on coal are about 7s. per ton o 1,000 kilos and 8s. wharfage, which is sometimes not collected when coal is taken from ship's side.

SURINAM (DUTCH GUIANA), *see* NETHERLANDS.

UNITED STATES.

BALTIMORE.

Enclosure in dispatch, dated Baltimore, 22nd March, 1904, from Mr. G. Fraser, H.B.M.'s Consul, at Baltimore.

1. Every effort has been made to ascertain what is the annual consumption of coal in this Consular district, but no reliable figures can be obtained. The principal reason for this is that a great quantity of anthracite coal, of which no statistics can be had, is brought into the district from Pennsylvania.

2. The sources of supply are the mines in Virginia, West Virginia, Maryland, Kentucky, and Pennsylvania.

3. Baltimore is the farthest point in the Consular district to which British coal has reached during the past ten years. Seven large railroad trunk lines, which extend all over the country, have their terminals in the district, and doubtless British coal would be placed on the same footing with respect to carriage as American.

4. Two pounds eight shillings to £3 per ton of 2,240 lbs. were obtained alongside vessels for Welsh anthracite coal imported in 1902 during the great coal strike in Pennsylvania.

The price of American anthracite delivered into railway trucks alongside vessels ranged from 12s. 6d. to £1 13s. 4d.

5. No British coal is furnished for the bunkers of British ships in this district. The 10,000 tons of Welsh anthracite coal which were imported in 1902, and the only importation which has taken place in the past ten years, were used entirely for domestic purposes at Baltimore.

6. Only 10,000 tons of British coal have been landed in the Baltimore Consular district during the past ten years, and no British coal is now imported. No British coke has ever been imported into the district so far as can be ascertained.

7. No British coal is ever carried on the railways in this district.

8. The present prices of American coal, both bituminous and anthracite, prohibit the importation of the British article.

9. The exports of coal and coke from this district have been decreasing, but only for the past two years.

As soon as the great congestion of other commodities on the railways reaching the coal mines is overcome, the exportation of coal will, in all probability, be resumed.

10. The import duty on bituminous coal is sixty-seven cents. per ton. Anthracite coal is admitted free of duty.

The objection made to the anthracite coal imported in 1902 during the coal strike was that instead of being properly screened, the purchasers got the "run of the mines." If properly screened and landed in good condition a market might be obtained for it, as otherwise the coal was found to be of excellent quality.

There seems to be no chance of introducing British bituminous coal into this district, as the native product can be delivered much cheaper, it having been delivered alongside vessel so low as 6s. 3d. per ton.

BOSTON.

Enclosure in dispatch, dated Boston, 12th February, 1904, from Mr. W. H. M. Sinclair, H.B.M.'s Acting-Consul at Boston.

1. The present consumption of coal per annum in Massachusetts is roughly estimated at 4,350,000 tons. Probably another million and a half is used in Maine, Vermont, and New Hampshire.

It is extremely difficult to arrive at the coal statistics of this district, as a large amount of the coal consumed arrives at various ports in the New York Consular District as well as by rail direct from the mines.

2. All coal comes from Pennsylvania, West Virginia, on the South, and Cape Breton and Nova Scotia on the north, nearly all the latter (from Canadian provinces) being used for gas making purposes.

The exception was the winter of 1902-3 when the Pennsylvania miners were on strike, causing a shortage of coal both for manufacturing and domestic purposes, and about 1,250,000 tons were imported from Great Britain into this port.

3. No British coal is ordinarily used in this vicinity.

4. During the winter of 1902-3 the average price paid for British bituminous coal delivered on wharf was $6·50 per ton. American coal sold at about $7·00.

5. Little or no British coal imported into this district is shipped for the bunkers of British ships.

6. See No. 2.

7. British coal imported into this district was mainly consumed in the immediate neighbourhood of Boston. No distinction exists between British and American coal as far as railway rates are concerned.

8. British coal is absolutely out of the question in this port unless a recurrence of the late strike takes place.

9. There are no exports of coal or coke from this district.

10. Import duty on foreign coal was removed during the strike, but has been reimposed.

CHARLESTON, S.C.

Extract from a dispatch, dated Charleston, S.C., 10th February, 1904, from Colonel H. de Coëtlogon, H.B.M.'s Consul, at Charleston, S.C.

1. With reference to the present annual consumption of coal, I find on inquiry that there are no official records kept of a general character in regard to this matter, each large consumer or dealer, apparently, keeping their own individual records only, and the smaller consumers and dealers keeping no records at all in most cases. For instance, it is estimated that the half dozen or more principal railway systems in this district each consume from 300,000 to 500,000 tons of bituminous or soft coal, the product of the Tennessee, Georgia and Alabama coal mines. The remaining product of the coal mines situated in Tennessee, Georgia, and also the small North Carolina output, that is, the proportion not used by the railways, is almost entirely absorbed by the local demand for domestic and manufacturing purposes; little coal being shipped abroad, or into distant home territory.

In addition to the above-mentioned consumption of the home product there is annually received at the principal ports of North and South Carolina and Georgia, an estimated aggregate of about 250,000 tons of anthracite, (hard coal) and soft coal, in about equal proportions, or say 125,000 tons each; which is brought here mostly by American sailing vessels from the Virginia and Pennsylvania coal districts; the soft coal being used mainly for steam vessels and manufacturing purposes, and the anthracite for domestic consumption.

2. *Sources of Supply.*—The principal sources of supply of coal consumed during the past ten years have been, as above stated, the coal mines of Alabama, Tennessee, Georgia, North Carolina, Virginia, and Pennsylvania.

3. *British Coal Imports.*—Twenty-five or thirty years ago cargoes of British coal were often brought to Savannah, Charleston and other ports in sailing vessels coming here for cotton cargoes, and the British coals so imported were generally sold at fairly satisfactory prices; but during the past ten years imports of British coal have been practically nothing, if we except some small quantity brought during last year's coal strikes, when prices were very much in excess of ordinary figures for a short time.

The decline in British imports is in part attributable to increased local production, improved facilities for handling and distributing coal over a wider territory than formerly, lower railway rates and greater competition for handling the business on the part of newer railway lines entering the field.

4. *Prices.*—Average for bituminous coal prices, delivered alongside ship at the ports, has ranged from four dollars and seventy-five cents ($4.75) to five dollars and twenty-five cents ($5.25) per ton for the best qualities, such as Pocahontas and New River coal; while the anthracite coal from Pennsylvania would command from six to eight dollars per ton, or more, according to season and market conditions.

Prices paid by the railway companies and other large consumers of Tennessee and Alabama or Georgia coal, delivered at bins 303 or 400 miles from mines, average about two dollars and seventy-five cents ($2.75) per ton. This grade of coal, however, while considered suitable for locomotive and many domestic and manufacturing purposes is not regarded as satisfactory or economical coal for steamship use, as it has been temporarily tried and abandoned both by American and British vessels that have experimented with it.

5. *Imports of British Coal.*—There are practically no imports of British coal into this market, as before mentioned, with some small exceptions.

6. The conditions now prevailing, as hereinbefore set forth, are about the same as those existing ten years ago.

7. *Railway Rates.*—Railway coal rates average about two dollars and fifty cents ($2.50) per ton for a haul of 500 to 600 miles. There is no discrimination permitted by law for the carrying of British or American products; the well-established rule being equal rates for all goods of the same class for the same distances.

8. *Sale of British Coal.*—The only way under existing conditions by which British coal could be sold in this market would apparently be by offering it at figures as low as, or lower than, the American article, which it would be difficult to do profitably, handicapped as British coal is by an import duty of sixty-seven cents. per ton payable to the United States Government.

9. *Exports.*—There are no exports of coal of any importance from the ports of this district.

10. *Import Dues.*—The import dues on foreign coal are, as above stated, sixty-seven cents. per ton payable on entry to the American Customs Authorities.

CHICAGO.

Extract from a dispatch, dated Chicago, 25th January, 1904, from Captain W. Wyndham, H.B.M.'s Consul at Chicago.

This Consular District uses no imported coal, and has enormous supplies of soft coal for manufacturing purposes in many parts of the country.

In a report, No. 580, Miscellaneous Series, from this Consulate in 1902, an account of the resources of the Consular district were given and few changes have occurred since; but while the district has a full supply for domestic use its output will never be exported owing to distance from the seaports and expense of carriage.

GALVESTON.

Enclosure in dispatch, dated Galveston, 10th March, 1904, from Mr. Horace D. Nugent, H.B.M.'s Consul at Galveston.

1. The Consular district under Galveston consists of the State of Texas and the Territory of New Mexico. No figures are published or procurable of the estimated consumption of coal in the district, but it is undoubtedly very large. As regards the town of Galveston itself, the consumption is some 50,000 tons of bituminous coal, chiefly for steam purposes, and about 25,000 tons of anthracite for domestic purposes.

2. Fifty per cent. of the coal comes from Alabama, and the remainder from Pennsylvania, Maryland, and Virginia.

3. British coal has not penetrated inland at all here.

4. Practically no British coal has been landed here. The greater part has been imported for use of vessels.

5. Nearly all.

6. The average quantity of British coal imported into this district for the last ten years is from 2,500 to 3,000 tons per annum. During 1902 and 1903 two cargoes of British coal were brought to this port, but this was exceptional owing to the American coal strike.

7. The railway rates chargeable would be the same as on any other coal, there being no differential rates.

8. It is impossible to make any effective suggestions in view of the prohibitive United States tariff on coal from abroad.

9. There are no exports of coal from this district.

10. The United States duty is too prohibitive to admit of British coal being profitably imported, therefore it cannot be regarded as a factor in this market. If the duty were withdrawn altogether it would be possible to compete with American coal, but British coal would not have any special advantage even under those conditions, as it could not be delivered here at any less than the domestic product, which now controls the market. The development of the oil fields in Southern Texas in the past few years has caused a decrease in coal consumption in the district of nearly 75 per cent. The railways are all using oil, and the little trade in steam coal that obtains here is with the harbour boats and with a few British steamers, which take only sufficient to carry them to Norfolk or Newport News.

HONOLULU.

Enclosure in dispatch, dated Honolulu, 17th February, 1904, from Mr. W. R. Hoare, H.B.M.'s Consul at Honolulu.

1. Present consumption of coal per annum, 120,000 tons approximately, used principally for manufacturing or steam purposes. The consumption for domestic purposes is not very large—approximately 1,000 tons per annum.

2. Sources of supply:—

New South Wales - -	115,441	tons per annum.
Departure Bay, B.C. Nanaimo Comox	15,687	,,
Welsh - -	10,000 to 15,000	,,

Welsh coal is imported only by the United States Government for the Naval station at Honolulu, but this description of coal would, doubtless, also be imported by merchants—more particularly for the supply of British warships—if there were a certainty of a regular demand, but there is not, as such ships arrive at uncertain intervals, and then they have to take such coal as is available.

Shipments have also been received latterly of American coal from Seattle, Washington Territory.

3. Coal is brought principally to the port of Honolulu, Island of Oahu, but occasionally cargoes to other islands arrive by vessels direct from the point of shipment to the island ports. Coal for the railway and sugar plantations on the line of road is loaded from vessels into railway trucks, and distributed by the Oahu Railway Company to points within fifty or sixty miles inland. For local consumption in Honolulu and neighbourhood it is stocked on the waterfront, and is carted thence to localities as required.

4. British coal has been delivered into railway trucks alongside vessels only during the past ten years. The present prices obtained for British coal delivered into railway trucks alongside vessels are as follows:—

		per ton $ cts.
New South Wales.	East Greta - - -	6.75
,,	Wallsend - - -	6.75
,,	Duckenfield - - -	6.75
,,	Pacific Co-operative -	6.25
,,	Seaham - - - -	6.50
British Columbia.	Departure Bay - -	8.00
,,	Nanaimo - - - -	8.00
,,	Comox - - - -	8.00

These prices are lower than coal has ever been before. The highest price would probably be $2.50 per ton more in each case. The actual figures cannot be given.

The above descriptions comprise the bulk of the coal so delivered.

5. It is impracticable now to obtain figures showing the actual quantity of imported British coal shipped for the bunkers of British vessels during the last ten years. The proportion is certainly not very large.

Last year (1903) the quantity supplied was much larger than usual on account of four British war vessels arriving, when about 3,200 tons were put into their bunkers, of which about 500 tons of Cardiff coal was courteously supplied by the United States Naval Authorities from the station depôt.

6. There has been no falling off in the quantity of British coal of either description imported during the last ten years. On the contrary, imports have increased to meet the demand for supplying United States warships and transports—the former especially using Cardiff coal, of which a supply, varying from 15,000 to 25,000 tons, is always kept in stock at the naval station.

7. This question is somewhat inapplicable to local conditions. There are no special charges except from the Railroad Wharf, Honolulu, to plantations on the line of road, and they, of course, vary according to the distance. The rate is the same on all coal, whither British or American. There is no native coal in the Hawaiian Islands.

8. The quantity of British coal imported is such as to meet the average requirements, and to keep a good stock on hand, independently of the varying conditions of the trade, as to price, freights, etc. It may be observed in this connection that the use of crude petroleum in substitution for coal is on the increase though not at present to any large extent.

9. There are no exports of coal or coke from the Hawaiian Islands.

10. There is at present a duty of sixty-seven cents. a ton on importations of coal other than American. Last year the duty was taken off temporarily to encourage importations (this on account of the tying up of coal by strikes, etc.), and importations were consequently larger so as to take advantage of the free entry.

MANILA.

Enclosure in dispatch, dated Manila, 31st July, 1904, from Mr. W. J. Kenny, H.B.M.'s Consul-General at Manila.

1. The present consumption of coal in the Philippine Islands, measured by the imports and local production, is about 200,000 tons per annum. Of this amount, it is estimated that not more than 5,000 tons are used for domestic and manufacturing purposes combined. All the rest is used for steam purposes, that is to say, on board men of war or steamships plying along the coast and from the Islands, and by the Manila-Dagupan Railway (120 miles). With the exception of a few sugar mills and hemp-presses worked by steam, there are no noteworthy manufactures in which coal is used in these Islands. Local production is estimated at about 3,000 tons.

2. The sources of supply during the last ten years are Australia, Japan and the United Kingdom, in the order named. The following table shows the proportions of coal imported from the above and other countries from August 13th, 1898, to the end of 1903. Statistics previous to the former date are not obtainable here.

Country.	Aug. 13th, 1898, to June 30th, 1899.	1899–1900.	1900–1.	1901–2.	1902–3.	June 30th, 1903, to Dec. 31st, 1903.	Total.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Australia	18,868	60,178	78,180	79,657	130,678	75,370	442,931
Japan	5,545	25,787	45,505	36,734	15,756	8,812	138,139
United Kingdom	60	—	1,295	8,150	11,101	5,881	26,487
United States	2,294	—	—	175	—	—	2,469
Other Countries	9,044	1,583	3,489	1,457	633	651	16,857
	35,811	87,548	128,469	126,173	158,168	90,714	626,883

3. British coal is not used inland. Facilities for transportation to the interior are limited to the Manila-Dagupan Railway, already mentioned in the answer to 1, and to bad roads or paths, the means used by the natives for transporting goods being, principally, water-buffaloes and roughly made carts.

4. There is no delivery of coal by railway trucks, the discharge being done into lighters. The British coal imported up to 1902 has been largely anthracite intended for naval use. The prices at which other coals, namely Australian and Japanese, were sold during the last ten years, have ranged from $16 to $22.50 (Mexican) a ton, in the case of Australian coal, and from $12 to $20 a ton, in the case of Japanese coal, free on board.

5. British coal imported into this district is very rarely shipped afterwards for the bunkers of British vessels, for the reason that the expense of shipping, namely, $3 (Mexican) per ton, makes it cheaper for vessels to coal at Hongkong, Singapore, etc.

6. The quantity of British coal imported has increased since 1902. The increase, which is in bituminous coal only, is said to be due, partly, to the increase in the number of local steamers employed here which are practically the only consumers, and, partly, to a falling off in the import of Japanese coal. The import of British coke is very small.

7. The railway (Manila-Dagupan Railway) does not carry British coal. Being a British concern, under British management, it is not supposed that differential rates would be charged against British coal, in the event of its carrying any.

8. There seems to be no way of increasing the consumption of British coal in these Islands. It is unable to compete with Australian or Japanese coal, being dearer at the pit's mouth and subject to higher freights.

9. There are no exports of coal or coke from this district.

10. An import duty of 25 cents. (U.S. gold) per ton is levied equally on all imported coal. There is no imposition affecting the competitive power of British coal, which is only adversely affected, as compared with Australian and Japanese coal, by the causes already stated, namely, higher freights owing to distance, and lower cost of the latter at the pit's mouth.

NEW YORK.

Enclosure in dispatch, dated New York, 15th February, 1904, from Sir Percy Sanderson, K.C.M.G., H.B.M.'s Consul-General at New York.

Note.—Replies to these questions are enclosed so far as it is possible to obtain the data, but there is practically no importation of foreign coal into this district unless under extraordinary circumstances, such, for instance, as the strike of miners in 1902. (*Extract from Sir Percy Sanderson's dispatch, dated New York, 15th February,* 1904.)

1. The consumption of coal per annum in the States of New York, New Jersey, Delaware, Connecticut, and Rhode Island cannot be given with any accuracy as no reliable figures are obtainable. The usual method of estimating one ton of anthracite per head for domestic purposes, and three tons of bituminous coal for steam purposes, would show in the States named :—

Population.	Anthracite. Tons.	Bituminous. Tons.	Total. Tons.
10,600,000	10,600,000	31,800,000	42,400,000

An estimate made from trade sources gives :—

Anthracite. Tons.	Bituminous. Tons.	Total Tons.
13,000,000	28,000,000	41,000,000

2. The source of supply for the past ten years have been from the following States, which have produced the number of tons indicated :—

	Pennsylvania.		Maryland.	West Virginia.
	Anthracite.	Bituminous.	Bituminous.	Bituminous.
1894	45,506,179	39,800,210	3,966,106	11,627,751
1895	50,847,102	51,813,112	4,526,185	11,387,961
1896	48,074,330	50,273,656	4,861,430	13,509,964
1897	46,947,350	54,674,272	5,303,489	14,360,455
1898	47,145,175	64,247,635	5,533,636	16,010,248
1899	54,034,224	73,066,943	6,131,461	16,250,150
1900	51,217,318	79,318,362	5,171,916	18,886,911
1901	59,905,951	80,914,236	6,139,329	21,599,121
1902	36,911,554	98,946,203	6,288,867	21,703,024
1903 (est.)	65,000,000	110,000,000	6,000,000	22,000,000

In addition to the above the imports have been as follows :—

	Years ending 30th June. Anthracite. Tons.	Bituminous. Tons.
1894	—	41,700
1895	—	7,600
1896	25	5,200
1897	20	6,700
1898	65	5,300
1899	11	5,100
1900	—	7,300
1901	—	2,700
1902	13	2,000
1903	139,300	58,000

	Calendar Years. Anthracite. Tons.	Bituminous. Tons.
1900	—	4,600
1901	—	2,400
1902	46,600	46,200
1903	92,700	11,800

From these figures it will be observed that the importation has been insignificant except during a period of artificial scarcity produced by strikes. In 1894 the bituminous coal miners were out on strike from 21st April to 18th June which caused a lack of fuel, and a general strike of railway men in July interfered with transport. In 1902 the strike of the miners of anthracite coal lasted from 12th May to 23rd October, and the effects of it were felt in 1903; import duties were remitted, but no large quantity of foreign coal was imported after March of that year. The figures for the Port of New York were, up to 31st March: anthracite coal 92,700 tons; bituminous coal 8,400 tons; 1st April to 31st December: anthracite coal nil; bituminous 3,400 tons.

3. 4. 5. 6. British coal has not penetrated inland of late years. As is shown above, foreign coal is only imported when the natural source of supply, namely, the coalfields of Pennsylvania, Maryland, and West Virginia fail to meet the demand; such failure is of a merely temporary character, and brought about by circumstances in the nature of strikes or interruptions of traffic. Prices are then abnormal, British coal fetches the same price as other coal, but importers run the risk of a renewal of the natural supply and of a consequent fall in prices which may convert an anticipated profit into a loss.

7. Railway rates are the same for British as for native coal or other imported coal, but no British coal is sent into the interior.

9. The exports of coal and coke from this district are in the nature of transit and represent the export to Canada through Buffalo, Oswego, Charlotte, Sodus Point, and Fair Haven. The amounts fluctuate, as appears from the returns for seven years given below; the export in 1902 was affected by the coal strike to which reference has been made:—

By Rail to Canada.

	Anthracite.	Bituminous.	Coke.
1896	1,251,724	1,098,169	38,068
1897	1,114,217	1,060,341	48,230
1898	1,178,839	1,348,238	93,234
1899	1,410,550	1,475,777	99,087
1900	1,610,659	2,705,538	167,030
1901	1,700,929	2,026,167	144,384
1902	1,388,321	1,761,953	181,526

By Water to various Ports.

	Anthracite.	Bituminous.	Coke.
1896	105,257	11,361	4,219
1897	103,518	9,796	401
1898	110,886	18,578	200
1899	118,013	35,412	3,628
1900	124,407	36,196	1,758
1901	149,300	73,526	2,948
1902	105,890	82,870	895

10. The import duties now in force are as follows:—

Bituminous coal ("lump" and as it comes)	67 cents	per ton.
„ „ Slack (screenings)	15 „	„ „
Anthracite coal, under 92 per cent. fixed carbon	67 „	„ „
„ „ over 92 „ „ „	Free.	

PHILADELPHIA.

Enclosure in dispatch, dated Philadelphia, 23rd March, 1904, from Mr. Wilfred Powell, H.B.M.'s Consul at Philadelphia.

1. For the present consumption of coal there appear to be no returns whatever, but the production of coal for this Consular District in 1902 (the last returns issued) is as follows:—

	Tons of 2,000 lbs.	Value at mine, per ton.
Pennsylvania - -	98,946,203	$1.08
Ohio - - - -	23,929,267	1.08
Indiana - - -	8,300,000	.95
Michigan - - -	869,228	1.35

The quantity used for domestic purposes, there are no returns to show; but there is relatively a consumption of two-thirds anthracite to one-third bituminous; that is to say, one-third anthracite used for manufacturing purposes and one-third for domestic purposes to one-third bituminous for manufacturing purposes.

The total production of anthracite coal in Pennsylvania is 41,340,929 tons of 2,000 lbs. at an estimated value of $2.00 per ton at mine.

2. This Consular District has been supplied with coal from the coal mines of Pennsylvania, Indiana, Michigan, and Ohio, also a small quantity of steam coal comes from West Virginia.

3. Not imported. During the great strike of the anthracite miners in 1902, a few thousand tons of Welsh anthracite coal were imported to Philadelphia for speculative purposes.

4.

5.

6.

7. If British coal were imported the railway companies over whose lines it travelled could be called upon to fix the rate.

8. There is a duty on anthracite coal (under 92 per cent. carbon) of sixty-seven cents per ton; on bituminous coal a duty of sixty-seven cents per ton: on coke and charcoal 20 per cent. ad valorem: on foreign bunker coal, if stored, sixty-seven cents per ton.

Many persons are of the opinion that if the duty were removed British coal would still have no opportunity of competing with the home market.

9. Of the total amount of coal the largest quantity was exported to Canada, in 1901, 5,080,963 tons; in 1902, 4,468,593 tons.

To the West Indies the United States exported, in 1901, 735,389 tons, and in 1902, 679,988 tons.

The total export of the United States during 1901 was 7,383,393 tons; in 1902, 6,126,946 tons.

About three years ago, owing to the abnormal condition of the freight market, several cargoes of steam coal were exported to the Continent of Europe, but this was discontinued within six months; there were also three or four cargoes of anthracite shipped from Philadelphia to Germany in the latter part of 1901 and the beginning of 1902, but this coal, I am informed, was repurchased and reshipped for the United States during the anthracite coal strike.

10. Under normal conditions, it would appear to be impossible to import coal from Great Britain into this Consular District with a hope of making a profit on it.

PORTLAND (MAINE).

Enclosure in dispatch, dated Boston, 12th February, 1904, from Mr. W. H. M. Sinclair, H.B.M.'s Acting Consul at Boston.

Report of Mr. J. B. Keating, Vice-Consul at Portland (Maine).

1. One million tons of coal in all, 250,000 tons being approximately for domestic purposes.

2. American, Canadian, English and Welsh.

3. To the most remote part of the State, distributed chiefly through this port and a small proportion through Bangor.

4. Not including the prices obtained during the strike in Pennsylvania (in 1903) the lowest price has been 10s. and the highest 13s. for bituminous coal—21s. to 24s. 6d. for Welsh anthracite.

The American bituminous coal costing from 13s. to 14s. and the American anthracite from 17s. 6d. to 24s. according to the season of the year and prevailing freight rates.

5. Approximately about 5 per cent.

6. The total of British coal imported at this Port

In 1902 was - - - - - -	225,248
In 1903 was - - - - - -	453,089
An increase of -	227,841 tons

This was due to the fact that during the latter year the duty of 2s. 8d. and 1s. 2d. on foreign coals was suspended. In addition, 22,537 tons of Welsh anthracite was imported for domestic purposes, and distributed throughout this and adjoining sections of New Hampshire and Vermont.

7. No differential rates are in existence. The prevailing tariff rates are governed by the distance and the location, if to a competitive point the distributor reaps the benefit of a lower rate than to other parts not competitive of less mileage.

8. During the suspension of the duty on bituminous coals the steamers bound for Portland carried from 1,500 to 3,000 tons of steam coals for local consumption. This importation is now closed by the re-imposition of the duty of 2s. 8d., 1s. 2d., and the export duty of 1s. per ton, which practically closes this port for the importation of British coals, even as ballast, and, with the exception of an insignificant amount of china clay, no other raw material of British origin is, in consequence of the Dingley Tariff, able to compete in the market with the American product, unless we except the Welsh anthracite coal, mentioned in my reply to Question No. 10.

9. Coals and coke are not exported from this district.

10. There is in this district a very great demand for Welsh anthracite coal, which is admitted to be superior to the American "hard" coals, being free from smoke, free burning, giving great heat, and with a much less percentage of ash and practically no cinders.

Shippers must, however, be prepared to ship the coal free from dust and fine coal, and in order to compete with domestic coal the prices should not exceed 20s. per ton c.i.f. Portland. British exporters should combine, if possible, to have a distributing agent here with wharf and storage privileges, the same as the domestic producers. At the above price a fair profit can be made, and I am in a position to judge that fully 60,000, and possibly 80,000, tons could be distributed annually. Dealers in outlying cities have no difficulty in obtaining from 2s. to 3s. more for Welsh anthracite than they can for the American coals.

Already in less than a year there has been imported into Portland 22,537 tons of Welsh anthracite, but owing to the immense percentage of dust and fine coal, the absence of proper facilities for discharging the Welsh coals (more brittle than the American), and the demurrage consequent upon delays, etc., the importers have been heavy losers, financially; but they have demonstrated that, with proper facilities for unloading, etc., the Welsh coal can successfully enter into competition with the American, and the consumer prefers it to any other coal for house heating and cooking purposes.

The Canadian bituminous coal, in addition to being nearer the American Market, has not to pay the export tax.

PORTLAND (OREGON).

Enclosure in dispatch, dated Portland (Oregon), 25th February, 1904, from Mr. Laidlaw, H.B.M.'s Consul at Portland (Oregon).

1. The consumption of coal in Washington and Oregon is nearly as follows:—

	Domestic purposes.	Manufacturing and steam purposes. Tons of 2,000 lbs.
In Washington - -	224,150	2,032,400
In Oregon - - -	49,500	112,900

In Idaho, so far as I can ascertain, there is very little consumption of coal, as wood is principally used for fuel and steam purposes, and the same is true of Oregon, but year by year, as wood grows more scarce and consequently higher in price, the consumption of coal is increasing.

2. The following Table gives the sources of supply for the last ten years in tons:—

Year.	Home Product.		British Columbia.		Great Britain.		Australia.	Japan.
	Washington.	Oregon.	Washington.	Oregon.	Washington.	Oregon.	Oregon.	Oregon.
1894	1,131,666	Unknown	2,113	—	—	370	10,813	1,754
1895	1,163,737	56,800	6,164	581	—	562	16,585	—
1896	1,202,524	55,000	5,103	552	—	248	16,882	798
1897	1,330,192	85,129	3,600	4,778	—	225	24,980	—
1898	1,775,257	56,782	20,540	720	—	2,933	7,889	397
1899	1,917,607	80,440	1,512	415	—	887	10,122	2,323
1900	2,418,034	90,000	8,820	2,278	—	680	126	219
1901	2,466,190	71,150	10,561	5,710	—	286	6,693	381
1902	2,690,789	120,000	22,472	—	—	3,198	11,947	3,407
1903	3,190,477	84,000	72,609	1,453	6,540	5,511	11,393	31

The ton in the home product columns is 2,000 lbs. only.

In addition to the foregoing there was received from the Atlantic States anthracite coal as under, but there has been no transport by sea for several years past :

Year	1894	1895	1896	1897	1898	1899	1900
Tons	1481	6018	1600	1450	5459	..	500 (of 2,000 lbs)

3. British coal has not, so far as I am aware, been sent inland during the last ten years.

4. British anthracite sold in 1899 at $9·50 ; in 1900 at $9·75 ; in 1902 at $7·25 ; and in 1903 at $7·50. Australian coal sold at 20s. in 1894 ; 18s. 6d. in 1895 ; 17s. in 1896 and 1897 ; 21s. in 1898 ; 21s. 6d. in 1899 ; 21s. in 1901 ; 21s. 3d. in 1902 ; and 18s. 6d. in 1903. Last year there was no duty imposed on coal. British Columbia coal sells at a little higher price than the Australian, as it is harder and better for steam purposes. Native coal averages about 13s. free on board at Puget Sound or at Coos Bay, where the only working collieries in Oregon are situated. In this market such coal sells at 20s. to 22s.

5. There is no British coal shipped for the bunkers of British vessels.

6. There has been an increase of late years in the imports of British coal, almost entirely anthracite, but German coke appears to be superseding the British, as will appear from the following comparison :

	1902 tons	1903 tons
English - -	648	918
German - -	393	1510
Belgian - -	441	497

Apparently this change is due to the fact that the German article is now considered to be at least equal to the British, and as vessels for these ports load oftener at Antwerp or Hamburg than at British ports the German coke can be laid down cheaper. The demand is not large enough for the shipment of full cargoes but it is increasing, as for certain foundry purposes the native coke does not appear to be so desirable.

7. There is no differential rate between British and other foreign coals and native coal.

8. In view of the production of cheap native coals it is hopeless to expect an increase of British coal trade, but only a small demand for anthracite (used in gas-making), smokeless and cannel for exceptional purposes and at times when outward freight rates are low. There is also danger of what little trade there is in Welsh anthracite being lost, as it is bitterly complained of on account of the excessive percentage of screenings even in so-called treble screened coal. This is said to amount to 25 or 30 per cent., but it can be laid down very much cheaper than the Pennsylvania, on which the percentage of screenings is very small. Freights from Swansea are at least 50 per cent. lower than those from the Atlantic ports of the United States.

9. The production of coal and coke has been rapidly increasing in this district, but the ratio of exports has been decreasing showing an increased home consumption, but there is no reason why exports cannot be largely increased. The production of coke in Washington has increased largely during the past year, amounting to 77,916 tons of 2,000 lbs., which is an excess of 41,567 tons over that of 1902.

10. There was an improved demand for foreign coal during 1903, as the tariff of 67 cents per ton was removed for a year. British bituminous coals cannot compete with native coal or those from Australia and British Columbia. Now and again small parcels of cannel coals will find a market, and occasionally there is a demand for Welsh smokeless for naval purposes, but with the exception noted there is practically no opening in this district for British coal.

PORTO RICO.

Extract from dispatch, dated Porto Rico, 22nd February, 1904, from Mr. W. B. Churchward, H.B.M.'s Consul at Porto Rico.

1. Taking a three years' average the consumption of coal is about 40,000 tons per annum. A very small proportion is used for domestic purposes, about one-fourth for manufactures, and the balance for United States naval requirements.

2. The principal source is Virginia. There was an import of Welsh coal during the great coal strike, and from time to time small quantities of such coal arrive from the States as part general cargo.

3. Not further than San Juan.

4. There is no railway trucking. British coal is only in demand by order, and would cost on wharf about $2·00 more per ton than the American, which averages about $6·00.

5. None.

6. On account of the British supply being so disproportionate to the ordinary supply, and of its spasmodic nature, no useful answer can be given. It may, however, be stated that, as regards profit, it is harder to introduce than before the American dominion.

7. None have ever been quoted.

8. By reducing the pit price to suit the Dingley Tariff.

9. No.

10. The tariff of 45 per cent. to which the article is subject.

SAN FRANCISCO.

Enclosure in dispatch, dated San Francisco, 5th February, 1904, from Mr. C. W. Bennett, C.I.E., H.B.M.'s Consul-General at San Francisco.

1. The accompanying broker's reports show the total amount of coal imported into this State during the ten years ended 1903. They are annexed in original as they contain information bearing on many of the points upon which particulars are desired. (See A.B.C.)

The proportion of coal used for domestic purposes in 1903 is estimated at 41 per cent. and for steam 59 per cent.

2. See Statement annexed for San Francisco only.

3. Very little coal goes inland, none is believed to have been sent more than 240 miles from San Francisco. All manufactories are either in the coast towns or on the bays. If sent inland rail transport would be used if river transport were not available.

4. As regards particular kinds referred to in the case of Australian coals, the standard is coal similar to Wallsend, Hetton or Co-operative, from Newcastle, New South Wales, district. In the case of coals from Great Britain semi-anthracites and anthracites from Cardiff and Swansea are taken as a basis. See Statement annexed, for prices.

5. Next to none ; principally British Columbian.

6. The importation of coal is regulated by the law of supply and demand, and appears to be but little influenced by freights or duties. The reason the importation has fallen off so greatly is that there is less demand for coal. The reason that there is less demand for coal is that crude petroleum has taken its place. Scores of steamers, and dozens of manufactories which formerly used coal now use oil. Its use is found to be cleaner, cheaper, and more satisfactory, especially as necessitating less manual labour.

7. No differential rates on railways for British coal as compared with American or other imported coals. The rates themselves vary according as there is transportation competition or not.

8. No. As long as the oil beds last, and oil is cheap and abundant, coal will be less and less used. During the past year the duty on coal was taken off, but the free entry did not in any way affect either the quantity imported or its price in San Francisco.

9. No exports.

10. Present import duty is 67 cents per ton of 2,240 pounds.

Statement showing the Imports of Coal by Sea at San Francisco.

Shipped from	1893.	1894.	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Australia	155,900	177,200	220,800	241,500	234,400	182,000	130,600	175,630	163,894	190,745	271,167
Great Britain	158,900	174,000	203,800	148,900	141,600	86,500	99,200	54,440	52,086	92,986	69,829
British Columbia	463,800	487,600	507,300	437,100	418,600	473,400	447,200	595,483	470,231	471,744	258,887
Atlantic Coast of U.S.	15,100	19,200	21,500	17,700	16,000	32,100	30,400	16,828	24,335	27,495	15,893
Port of Seattle	179,100	157,700	137,900	134,200	191,100	265,600	323,500	266,186	249,121	169,209	114,623
Port of Tacoma	271,600	257,300	272,200	263,900	327,100	357,800	337,400	424,460	406,505	206,942	274,633
Coos Bay	—	41,600	44,700	49,100	50,700	31,800	36,500	39,773	37,015	34,910	48,625
Miscellaneous	33,800	14,500	7,000	4,500	6,200	2,100	13,200	*51,326	*41,217	*71,051	*99,159
Total Tons for Year	1,278,200	1,329,100	1,415,200	1,296,900	1,385,700	1,431,300	1,418,000	1,624,126	1,444,404	1,265,082	1,152,816
Cargo price Best Australian during the year.											
Duty paid :—	$	$	$	$	$	$	$	$	$	$	$
Highest	6·50	6·50	5·80	5·25	6·25	7·50	7·50	7·25	6·75	6·10	6·25
Lowest	6·20	5·65	4·75	4·25	4·65	5·95	6·00	6·75	5·75	5·00	4·90
Cargo price British Coal during the year.											
Duty paid :—											
Highest	6·80	7·00	6·25	6·75	7·25	7·50	7·75	8·00	9·00	8·25	7·25
Lowest	6·50	5·25	4·80	5·05	6·10	6·95	6·70	7·25	7·25	7·00	6·50

* Includes Coke.

COAL.

A. Annual Report for 1897.

To the Coal Importers and Wholesale Dealers of San Francisco.

Gentlemen,—The fuel consumption of California this year is about 7 per cent. greater than in 1896, which evidences that the outgoing year has been a fairly profitable one for some of our manufacturing branches. Consumers were favoured with low priced coal the first half of this year, but the Dingley Tariff went into effect in July, causing an advance on all grades equal to the change of the duty; this change cuts a small figure with housekeepers and small consumers, but it is a serious detriment to those industries where fuel is the principal factor in their expense account. Coal freights from Australia and Great Britain have ruled high for several months past, thus aiding to sustain full figures, as our coast colliery managers regulate their scale of prices by the import cost of Colonial and English; hence this year has proved a very profitable one for our northern coalfields. It is a query how the local coal market will shape itself in 1898; there is no doubt as to the ability of British Columbia and Washington to fully supply us with all the fuel we may need in case foreign shipments should diminish, but the ear-marks are visible of probable labour troubles when the Klondyke exodus commences, and the writer predicts that all grades of labourers will catch the fever. Even if no trouble emanates from that source, there will certainly be a sparsity of vessels for transporting coal, as they will assuredly drift into the more profitable business of carrying freights and passengers towards the Alaskan goldfields. It is true this will last for only a few months, but of sufficient duration to materially affect fuel values within that brief period. Prudential managers should provide against such contingencies; a lack of foresight is sometimes costly.

The following Table of prices will show the monthly fluctuations of foreign coals for "spot" cargoes:—the average price is given for each month.

	Jan.	Feb.	Mar.	Apr.	May.	June.	July.	Aug.	Sept.	Oct.	Nov.	Dec.
Australian (gas)	5·25	5·25	5·15	5·10	5·15	5·20	5·25	5·50	5·75	6·00	6·10	6·10
English Steam	6·35	6·25	6·25	6·00	6·25	6·25	6·25	6·50	6·75	6·75	6·75	6·75
Scotch Splint	6·50	6·50	6·25	6·25	6·25	6·25	6·50	6·75	7·00	7·00	7·00	7·00
West Hartley	7·00	7·00	6·75	6·75	6·75	7·00	7·00	7·25	7·25	7·25	7·25	7·25

The various sources from which we have derived our supplies are as follows:

	1894. Tons.	1895. Tons.	1896. Tons.	1897. Tons.
British Columbia	647,110	651,295	551,852	558,372
Australia	211,733	268,960	273,851	281,666
English and Welsh	157,562	201,180	156,368	107,969
Scotch	18,636	4,098	8,356	4,081
Eastern (Cumberland and Anthracite)	16,640	26,863	17,907	21,335
Seattle, (Franklin, Green River, &c.)	153,199	150,888	128,919	220,175
Carbon Hill, South Prairie, &c.	241,974	256,267	255,923	286,205
Mount Diablo and Coos Bay	65,263	84,954	110,237	115,150
Japan, Alaska, &c.	15,637	9,015	2,247	6,587
Total	1,527,754	1,653,520	1,505,660	1,601,540

As it is necessary to include deliveries at Port Los Angeles, also at San Diego, to arrive at an accurate statement of the consumption of coal in the State, I have added these in the above sources of supply. The total amount received by water at these two points aggregates 155,238 tons.

Coke.—The total deliveries this year have been 30,320 tons, 5,812 tons less than 1896—2,573 tons came from British Columbia, and 1,889 tons from Australia; these are two new sources of supply for this market.

Pig Iron.—The total imports of pig iron have been 10,421 tons—3,505 tons from England, the balance was Eastern. Prices this year were the lowest on record, and it is singular that any foreign can be imported unless at a loss, having $4·00 per ton duty to pay, and its original cost is higher than American. Only 198 tons of foreign scrap iron were imported; there were 1,116 tons received here last year. In 1892, 11,113 tons were received; the low price of pig iron causes the shrinkage in consumption.

As the rainfall is a marked factor in establishing the freight rates on coal from all foreign sources, it is yet too early to predict its effect on the 1898 coal market. Our experience has taught us that a copious harvest signifies liberal shipments of Australian and English coals at a low cost delivered here, thus benefiting our manufactories and industrial interests.

The general belief is, we have a particularly prosperous year before us; there are a number of valid reasons to sustain us in our hoping it may prove so.

Yours very respectfully,

J. W. HARRISON.

COAL AND OIL.

B. Annual Report for 1900.

This has proved itself the banner year for coal imports into California, exceeding in quantity all former years. Fuel consumption is usually figured as an infallible indicator of prosperity, hence we must credit 1900 as being in the foremost position for profits emanating from railroads, shipbuilding, iron products, and manufacturing interests generally. The increased consumption in the face of the extremely high cost of coal pervading the year, evidences great prosperity in all commercial branches, particularly so for our coast colliery proprietors. They have found a market here and in Honolulu for their entire output, and the prices realised are largely in excess of those ruling for the past several years. There is every probability that the coal imports will be equal in volume this incoming year, but values will not rule as high, as conditions will be dissimilar. Coal carriage will be less, and fuel oil will declare itself as a formidable competitor; in fact, coal contracts are now being made at shaded figures for next year's delivery. The Australian shipments are diminishing gradually, as our local consumers cannot pay importers' asking prices, which are fully 15 per cent. higher than this time last year. Deliveries from Great Britain are almost nil, as quotations there make their consumption prohibitory, the asking prices f. o. b. at the various shipping points in England and Wales, in some cases are more than double those of a year ago. We are promised new sources of fuel supplies from the North, within a year, as coal properties are being developed in various sections, but little reliance is being placed on those promises, as they so seldom materialise.

The various sources from which we have derived our coal supplies are as follows:—

	1897. Tons.	1898. Tons.	1899. Tons.	1900. Tons.
British Columbia	558,372	651,208	623,133	766,917
Australia	281,666	201,931	139,333	178,563
English and Welsh	107,969	75,115	93,263	54,099
Scotch	4,081	5,056	none	none
Eastern (Cumberland and Anthracite)	21,335	37,560	38,951	17,319
Seattle (Washington)	220,175	283,963	271,694	250,590
Tacoma (Washington)	286,205	348,474	355,756	418,052
Mount Diablo, Coos Bay and Tesla	115,150	172,506	189,507	160,915
Japan, and Rocky Mountains by rail	6,587	26,560	28,390	42,673
Total	1,601,540	1,832,373	1,740,027	1,889,128

To secure a complete statement of the entire coal consumption of California, I have been obliged to include deliveries at Port Los Angeles and San Diego by water, which has been added in the above sources of supply. The total amount received by water at those two ports foot up 165,965 tons.

Fuel Oil.—No event has occurred in the history of our State, which will determine its permanent and successful career, as the promising oil developments in several of our interior counties during the year 1900. It now declares itself a potent factor, as a steam and heat producer to every manufacturing interest in the State, and its permanency cannot now be questioned. It will take several months before its distribution can be uniform, and consumers may become assured of regular delivery as required. Already several of our large coal consumers have modified their plant to conform to oil; they claim the change has diminished their expenses account materially, and they can see no valid reason for discontinuing its use. I have gleaned information through every reliable source, and I feel assured that my figures are conservatively correct, that the product of Fuel Oil (only) for 1900 will foot up 4,300,000 barrels, and for the incoming year it can be safely estimated that these figures will be increased fully 12½ per cent. This will be an increase of about 100 per cent. over and above the figures officially reported by the State Mining Bureau, as the output for 1899. It is claimed there are over 1,450 wells now producing, which number is increasing monthly. Some of these wells have been capped, as the present tankage is insufficient, although their present capacity, including the Refineries' tanks, amounts to nearly 900,000 barrels. Fuel oil can be delivered to consumers here at about one dollar per barrel, and it is generally conceded that this price will be shaded later on. This means low-priced fuel, and will assure us a large number of factories, etc., which could not be profitably maintained under ruling coal values.

Coke.—The total amount received here by water foots up 41,741 tons, against 31,091 tons last year. It is difficult to approximate to the quantity received by rail, as it does not reach San Francisco, being delivered direct to interior consumers. Over 50 per cent. of the coke reaching here comes direct by sail from England. There were over 6,000 tons of Comox coke delivered here from British Columbia, which found immediate sale.

Pig iron.—The arrivals of pig iron by sail aggregate 8,506 tons; of this 3,820 tons are English, the balance is American. The total deliveries last year were 6,593 tons. Prices have fluctuated materially, yet the amount melted shows that a fair business has been done in this line, with bright prospects for a still further improvement this coming year.

The year 1901 shows a most prosperous opening for each and every branch of commerce, where fuel has heretofore been a leading item of expense. Oil has come to the rescue, and its beneficent influence cannot be overestimated, as there is an unlimited field for the manufacturing of varied articles, many of which we are forced to import at present. The coal demand for our varied steamships, transports, etc., also for domestic purposes, will never be less than it is now. All signs point to the coming year being the banner year for California, a seasonable rainfall to date, our canneries (fruit and fish) running to their fullest capacity, our gold mines yielding bountifully, new lines of steamers projected, and now fuel oil to furnish cheap energy, the above combined mean assured prosperity.—Yours very respectfully,

J. W. HARRISON.

C.—FUEL REPORT FOR 1903.

Coal and Oil.

The quantity of coal imported during the year is 230,044 tons less than 1902, as can be ascertained by referring to the figures below; this cannot be accepted as the amount of fuel to fill our requirements, as the quantity of fuel oil which has been produced this year has been 60 per cent. in excess of the produce of 1902, hence the showing made for the coal consumption cannot be accepted as being a discouraging one for manufacturing interests locally. The early portion of this year labour disturbances developed themselves in the British Columbia collieries; these were not amicably compromised for some considerable time, as the manager of the Wellington collieries showed a disposition to maintain his rights rather than make concessions, although at a serious loss to himself; the labourers finally acceded to his demands. The abrogation of the duty of 67 cents per ton on Australian and British Columbia coals has proved for the year a marked advantage for their products, and has aided in giving large consumers here a pronounced benefit. The duty expires on the fifteenth of next month. It will be a marked detriment to our manufacturers, and large consumers of fuel, if the duty on coal does not remain eliminated; it it resolves itself into a case where the greater good to the greater number is considered, the duty on coal will never again be considered.

The present position is a complicated one; the outlook for low-priced Australian coal is discouraging, partially because the inducements for carriers to come here are anything but profitable, and partially because outward freights on grain from here are exceedingly low, and grain freights from Australia are fully 50 per cent. higher than from here. The quantity of coal of all grades on hand here at present is small. There are uncertain factors now existing which may create a very generous demand for fuel in the near future, principally the requirements of our Government, for Panama and adjacent ports; hence the market is in a very uncertain condition. If the present outward rates of freight on grain from here should show no improvement in the near future, which will minimise colonial imports, thus leaving the control of the local coal market in very few hands, which will assure high figures for 1904, the marked difference between the prices of domestic grades and ordinary steam coals is likely to be sustained, as the output of the former is concentrated in very few hands.

The various sources from which we have derived our coal supplies are as follows:—

	1900. Tons.	1901. Tons.	1902. Tons.	1903. Tons.
British Columbia	766,917	710,330	591,732	289,890
Australia	178,563	175,959	197,328	276,186
English and Welsh	54,099	52,270	95,621	61,580
Scotch	none	none	3,600	3,495
Eastern (Cumberland and Anthracite)	17,319	27,370	24,133	13,262
Seattle (Washington)	250,590	240,574	165,237	127,819
Tacoma (Washington)	418,052	433,817	209,358	256,826
Mount Diablo, Coos Bay and Tesla	160,915	143,318	111,209	84,277
Japan, and Rocky Mountains by rail	42,673	51,147	47,380	102,219
Total	1,889,128	1,834,785	1,445,598	1,215,554

To secure a complete statement of the entire Coal consumption of California, I have been obliged to include deliveries at Port Los Angeles and San Diego by water, which have been added in the above sources or supply. The total amount received by water at those ports foot up 69,248 tons.

Fuel oil.—It can be safely computed that the Californian products of oil for 1903 will foot up between 20,000,000 and 21,000,000 of barrels as against 13,000,000 for 1902. Deducting the quantity which will be refined and the amount which will be exported, there will yet remain enough for steam uses to be a disturbing factor in the consumption of coal. During the year there has been a marked advance of a further improvement in price of oil. The railroad companies have absorbed most of the most promising properties the output of which will not seek buyers, hence the market price will not be affected.

It is anticipated that the product of oil the coming year will largely exceed the figures for 1903; this may prove true, but there is evidence already before us, that the output of a large number of our older wells is shrinking materially, and in some cases very markedly.

Coke.—The total deliveries here by water, foot up 68,090 tons as against 64,916 tons last year. Fully 75 per cent. of this amount was shipped from England and Germany, the balance principally from Belgium and Australia.

Pig iron.—The total importations by water aggregate 29,845 tons; about half of this was shipped from Great Britain. This would demonstrate an increase of manufacturing interests during the year, as the total amount received in 1891 was 8,478 tons.

The general review for the year for the consumption of fuel, and pig iron, will clearly indicate that the year has proved a profitable one in the manufacturing line, and we have reason to believe that there will be no diminution the coming year; in fact the ear-marks indicate that we have promises before us for a marked increase over the present year.

Yours respectfully,

J. W. HARRISON.

URUGUAY.

MONTE VIDEO.

Enclosure in dispatch, dated Monte Video, 11th February, 1904, from Mr. Walter Baring, H.B.M.'s Consul-General at Monte Video.

Report drawn up by Mr. V. Kestell-Cornish, H.B.M.'s Consul at Monte Video.

1. The quantity imported annually, taking the average imports for the ten years ending and including 1902 (which are the latest statistics available)—105,785 tons (of 1,000 kilometres) of the declared value of 1,057,849 dollars—£225,074. Of the above total the Central Railway Company consumes 24,000 tons. For manufacturing purposes is consumed about 41,000 tons. For domestic purposes is consumed about 24,000 tons.

2. Wales, Scotland (Clyde and Forth), Newcastle and Sunderland. A certain amount of American coal is also imported, but the quantity is very insignificant.

3. As far as Rivera on the Brazilian frontier by rail, and Salto by river steamer.

4. There do not exist at Monte Video wharves at which vessels can be berthed.

The highest price of coal put into railway wagons at the railway wharf including duty (91 cents per ton), labour, and lighterage—36s., and the lowest price 34s. per ton. Cardiff coal only is so used.

5. The total amount of coal put annually into the bunkers of steamers at Monte Video equals 279,763 tons, of which about three-quarters goes to British steamers. The coal thus destined for steamers (of all nationalities) is not taken count of by the Customs, and is therefore quite distinct from the returns of imports inserted in reply to Question 1.

6. There has been no diminution, imports having been well maintained in the last ten years.

7. (*a*)

				per ton	£	s.	d.
For the distance of	100	kilometres		$2.35—0	10	0	
,, ,,	200	,,		$3.55—0	15	2	
,, ,,	300	,,		$4.70—1	0	0	
,, ,,	400	,,		$5.30—1	2	6	
,, ,,	500	,,		$5.87—1	5	0	

(*b*) There is no native coal, and there are no differential rates for British coal as compared with other imported coal.

8. The trade of the past ten years has been satisfactory, and no means are known by which it could be increased.

9. No.

10. There is a 91 cent duty on coals for local consumption, and none on that which is supplied to Ocean steamers for bunkers. All coal imported into Uruguay pays the same duty of 91 cents—3s. 10d. per ton of 1,000 kilos.

VENEZUELA.

CARÁCAS.

Enclosure in dispatch, dated Carácas, 27th February, 1904, from Mr. W. A. Andral, H.B.M.'s Acting Consul at Carácas.

1. Total quantity of coal imported in this district through Port of La Guaira is about 13,000 tons. This consists almost entirely of patent fuel, and is intended for the use of the Venezuelan Navy, and three railway companies. For manufacturing purposes about 400 tons are used, but none whatever for domestic purposes.

2. Principally Great Britain (Cardiff and Port Talbot), for of the amount mentioned only 1,200 tons came from the United States, and that is gas coal for lighting purposes.

3. Not further than forty miles from the coast, at which distance the railways in activity are situated.

4. Coal is never sent here for sale. Cargoes are ordered as required, and charters made, either with steamers or sailing vessels, for transport hither. It is not possible to furnish statistics, as no records are obtainable.

5. No—none.

6. No—none.

7. The freight by railway from La Guaira to Carácas is 25 bolivars per 100 kilos.

8. There is at present no necessity for more coal, and so the trade cannot be increased. In fact, the quantity might soon decrease, as the Venezuelan gunboats are not in such active service as during the last year.

9. No.

10. Coal is duty free in Venezuela.

CIUDAD BOLIVAR.

Extract from dispatch, dated Ciudad Bolivar, 11th March, 1904, from Mr. C. H. de Lemos, H.B.M.'s Consul at Ciudad Bolivar.

1. In this Consular District there is no consumption of coal for either domestic, manufacturing, or steam purposes.

2. The only fuel employed for these purposes is wood fuel and charcoal.

3. The restrictions and difficulties placed on trade and navigation make the cost of imported coal too high to compete with wood fuel, which is furnished by the still abundant forests. No coal has penetrated inland owing to the total absence of easy means of transportation, like railways or good roads.

Question Nos. 4 to 9, it will be seen, cannot be answered.

10. The only part of this Consular District where coal has been found is in the north, near the coast, at Guanta (Barcelona). The seams there were worked on a small scale, first by a French, and later by an English company, but are reported to have been abandoned, partly on account of the difficulties connected with enterprises in Venezuela, and partly on account of the inferior quality of the coal produced.

WESTERN PACIFIC ISLANDS.

NOUMEA (NEW CALEDONIA) *see* FRANCE.

TAHITI, *see* FRANCE.

TONGA.

Enclosure in dispatch, dated Tonga, 11th April, 1904, from Mr. Hamilton Hunter, C.M.G., H.B.M.'s Consul at Tonga.

1. About twelve tons used annually for domestic purposes, no manufactures, balance supplied to British men-of-war.

2. About 200 tons annually from Westport, New Zealand. 350 tons in hand at present time.

3. No inland transportation.

4. All Westport, New Zealand, coal delivered at the wharf at from 43s. to 45s. per ton.

5. Very little coal sold to any but British men-of-war.

6. See answer to Question 2.

7. No railways, no differential rates.

8. None.

9. None.

10. No import duties or other impositions on coal, except the cost of trucks for landing or delivering and wharfage.

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